

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 the 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 is a section for 'Version information (4 questions, 0 answered)' with a '+' icon. Below that is a section for '1. Data summary (6 questions, 0 answered)' with a '-' icon. The '1. Data summary' section contains a text area with the question 'What is the purpose of the data collection/generation and its relation to the objectives of the project?'. To the right of the text area, there is a comment box with the heading 'Add comment' and the text 'Please add a comment'. The comment box has a rich text editor toolbar with buttons for bold, italic, bulleted list, numbered list, link, and table.

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: 'Generic DMP' (highlighted in blue) and 'Faculty of Psychology & Educational Sciences DMP'. The bottom section contains a note about selecting other sources of guidance.

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

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

[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.

Generic DMP

Generic DMP

Faculty of Psychology & Educational Sciences DMP

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

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☰

☰

🔗

📄

▼

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

pertains to specific question in specific template

automatically opened next to question

usually pertains to same entity as template

appears as "Guidance"

themed guidance from organisation

applies accross templates

open by clicking '+' sign

pertains to institution as a whole

e.g. "UGent guidance on Storage and Backup"

themed guidance from other sources

applies accross templates (but can be made optional)

open by clicking '+' sign

pertains to subset within institution

e.g. "Humanities Faculty guidance on Storage and Backup"

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 - Datamanagementplannen*

*NOTE: Science Europe/NWO initiative to develop a **core set of requirements for DMPs**, as part of effort towards international alignment of RDM policies and practices. Based on a comparison of existing templates in Europe and beyond; final version to be expected in Autumn of 2018. More info on the Science Europe RDM Initiative page.*

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
Generic DMP	Generic DMP template (based on DMPonline_TemplateUGent_GenericDMP_v3.1) ... (continued)	true	22-10-2015	Edit

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, the user is signed in as Myriam Mertens. A dropdown menu is open, showing options: Edit profile, Super admin area, Admin area (highlighted with a red circle), and Sign out. Below the navigation bar, there are buttons for Templates, Guidance, and Organisation. The main section is titled 'Organisation details' and contains a table with basic details for the organisation.

Signed in as [Myriam Mertens](#) ▾

- Edit profile
- Super admin area
- Admin area**
- Sign out

Templates Guidance Organisation

Organisation details

These are the basic details for your organisation.

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

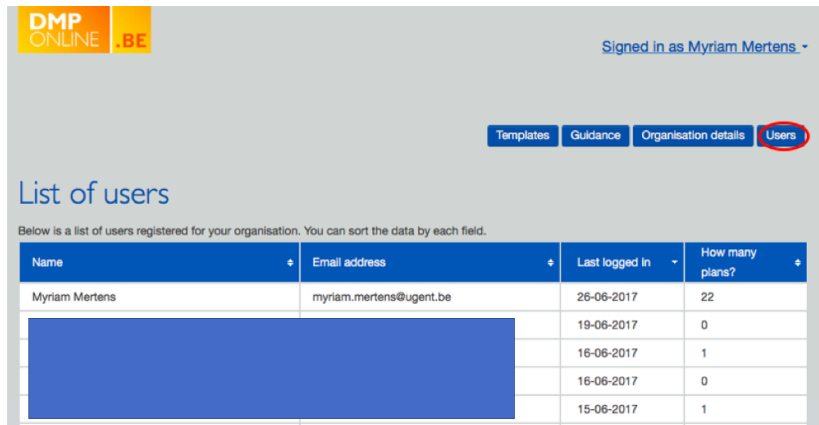
These are the basic details for your organisation.

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**

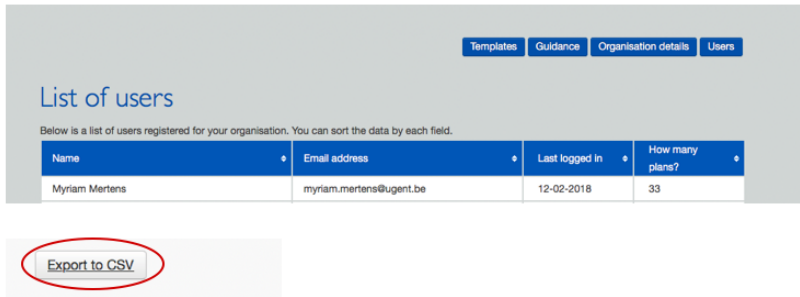
List of users

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

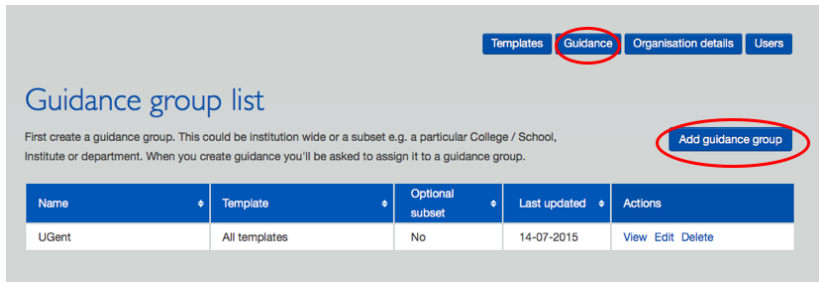
Export to CSV

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”



The screenshot shows a web interface for managing guidance groups. At the top, there are four navigation buttons: 'Templates', 'Guidance', 'Organisation details', and 'Users'. The 'Guidance' button is circled in red. Below the navigation bar, the title 'Guidance group list' is displayed. A descriptive paragraph states: '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.' To the right of this text, a button labeled 'Add guidance group' is circled in red. Below the text is a table with five columns: Name, Template, Optional subset, Last updated, and Actions.

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 of the form, there are two buttons: 'Save' (circled in red) and 'Cancel'. There are also three question mark icons next to the input fields.

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

☐ Faculty of Law & Criminology

Create plan

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

New guidance [View all guidance](#)

Text

Enter your guidance here. You can include links where needed.

Should this guidance apply: **by themes**

None
Confidentiality
Data Capture Methods
Data Description

Guidance group: UGent

Select which theme(s) this guidance relates to.

Select which group this guidance relates to.

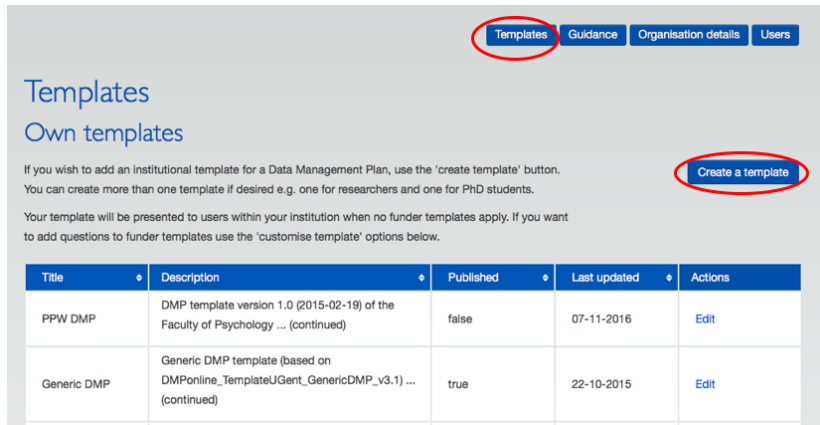
Save Cancel

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* ☰ ☷ ☹ ☎ ☒ ▼

?

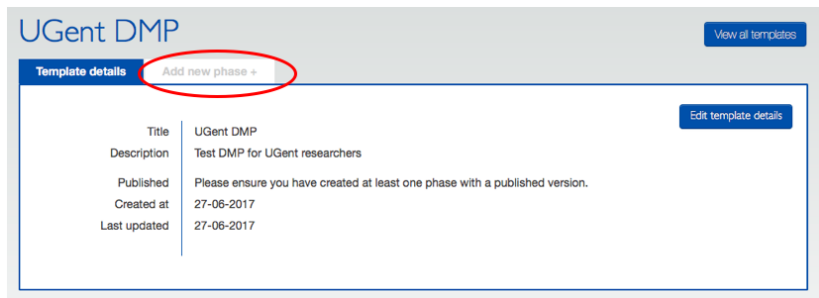
Enter a description that helps you to differentiate between templates e.g. if you have ones for different audiences.

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 button labeled 'View all templates'. Below the logo, there is a navigation bar with two tabs: 'Template details' (which is active) and 'Add new phase +'. The 'Add new phase +' tab is circled in red. Below the navigation bar, there is a table with template details and an 'Edit template details' button in the top right corner of the content area.

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 labels: "Order of display" and "Description". The "Order of display" section contains a small box with the number "1" and a circular arrow icon. The "Description" section contains a rich text editor with a toolbar featuring icons for bold (B), italic (I), bulleted list, numbered list, link, and table. Below the toolbar is a large empty text area. A blue question mark icon is positioned to the left of a tooltip. The tooltip text reads: "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." In the bottom right corner, 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 titled "Order of display" with a dropdown menu showing "1". To the right of this is a "Description" field with a rich text editor toolbar containing icons for bold (B), italic (I), bulleted list, numbered list, link, and table. A blue question mark icon is next to the toolbar. At the bottom left, the "Add question" button is circled in red. At the bottom right, there are "Save", "Delete", and "Cancel" buttons. A blue "Add section" button is located at the very bottom right of the interface.

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>B <i>I</i> </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>B <i>I</i> </div><div></div></div><div></div></div>	<div>?</div>	
Themes	<div>None Confidentiality Data Capture Methods Data Description</div>	<div>?</div>	
		<div>Save</div>	<div>Cancel</div>

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 is a header with the 'UGent DMP' logo and a 'View all templates' button. Below the header, there are two tabs: 'Template details' (which is selected and circled in red) and 'UGent DMP'. To the right of the tabs is a button labeled 'Add new phase +'. The main content area is divided into two columns. The left column contains labels: 'Title', 'Description', 'Published', 'Created at', and 'Last updated'. The right column contains the corresponding values: 'UGent DMP', a rich text editor with the text 'Test DMP for UGent researchers', a checked 'Published' checkbox (circled in red), and the dates '27-06-2017'. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red.

UGent DMP

View all templates

Template details UGent DMP Add new phase +

Title UGent DMP

Description

B I [List Icons] [Link Icon] [Table Icon]

Test DMP for UGent researchers

Published ☒

Created at 27-06-2017

Last updated 27-06-2017

Save Cancel

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 logged in as 'Signed in as [name]'. The wizard consists of several steps:

- Step 1: Select your funder.** The user has selected 'Université libre de Bruxelles' from the dropdown menu. The 'Funder name' field is empty.
- Step 2: To see institutional questions and/or guidance, select your organisation.** The user has selected 'Université libre de Bruxelles' from the dropdown menu. The 'Not applicable/not listed' link is visible.
- Step 3: Tick to select any other sources of guidance you wish to see.** The 'DOC' checkbox is unchecked.
- Step 4: Confirm plan details.** The user is prompted to confirm the details: Funder: None, Institution: Université libre de Bruxelles, Template: **ub-test-template** (circled in red), and Other guidance: None. The 'Yes, create plan' button is circled in red.
- Step 5: My project (ub-test-template).** The user is prompted to fill in the basic project details: Project name (My project (ub-test-template)), ID, Grant title, Principal Investigator/Researcher (Myriam Martens), Principal Investigator/Researcher ID (0000-0001-9412-0103), Plan data contact, and Description. The 'ub-test-template' is circled in red.

Red arrows indicate the flow from the 'Create plan' button in Step 1 to the 'Confirm plan details' dialog in Step 4, and from the 'ub-test-template' in Step 4 to the 'My project (ub-test-template)' form in Step 5.

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

The screenshot displays the UGent DMP admin interface. At the top, a table lists templates, with the 'Edit' button for 'Test DMP for UGent researchers' circled in red. Below, the 'UGent DMP' template details are shown, including a 'Phase details' section and a 'Versions' table. The 'Edit' button in the 'Versions' table is also circled in red. An 'Edit alert' dialog box is open, prompting the user to choose between 'Make small changes' and 'Make big changes'.

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

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 on Metadata
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, each with a plus icon to its right:

- 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
- 6. Other issues

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. Below that is a "Description" field with a rich text editor toolbar (containing bold, italic, list, link, and other icons) and a text area. At the bottom right of the dialog are "Save" and "Cancel" buttons.

Reporting issues

What to do when you encounter a bug in the software?

- ▶ sometimes admins will encounter/become aware of *bugs* in the software (e.g. because they get an error message)
- ▶ how to report such issues, so that they can be solved?
 - ▶ preferably not via email!
 - ▶ issues can be flagged in the DMPbelgium GitHub repository
 - ▶ how? follow the steps outlined in <https://github.com/DMPbelgium/Guidance/blob/master/ReportingIssues.pdf>

The end!