



# DMPonline: creating, editing and publishing templates

You can add one or more templates in DMPonline. Your template will be displayed to users in your organisation when no funder template applies. If you want to ask questions in addition to funder requirements, use the option to 'Customise funder templates'. This allows you to add section(s) with questions from your organisation.

A template can have one or more phases. For example, you may have an initial DMP that is created at the proposal stage and a full DMP which is completed during the project. Templates are usually divided into a number of sections, each with a few questions.

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## Create a template

Select "Templates" from the Admin features dropdown menu and click the "Create template" button. You can create multiple templates depending on your local needs e.g. a generic institutional template and one for PhD students.

### Templates

If you wish to add an organisational 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 organisation when no funder templates apply. If you want to add questions to funder templates use the 'customise template' options below.

Own Templates
Customizable Templates

#### Own Templates

All (1)   Published (1)   Unpublished (0)

Template Name	Description	Status	Edited Date	
Glasgow DMP		Published	05-08-2018	Actions▼

Create a template

Enter a title for the template and optional description. We recommend not using "template" in the title as this will result in redundant use of the term where automated messages appear throughout DMPonline.

## New Template

[View all templates](#)

Template details

\* Title  
PhD DMP

Description  
A template to be used by PhD students as part of the new institutional policy

Status  
Unpublished

[Save](#)

## Add a phase

After saving your template details, click the second tab to "Add new phase." Most templates only have a single phase. If this is the case, we recommend using the title "Data Management Plan." Multi-phase templates are useful if a data management plan is required at different stages of a project (e.g. before a project begins and after data have been collected and deposited in a repository).

## PhD 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  
Data Management Plan

\* Order of display  
1

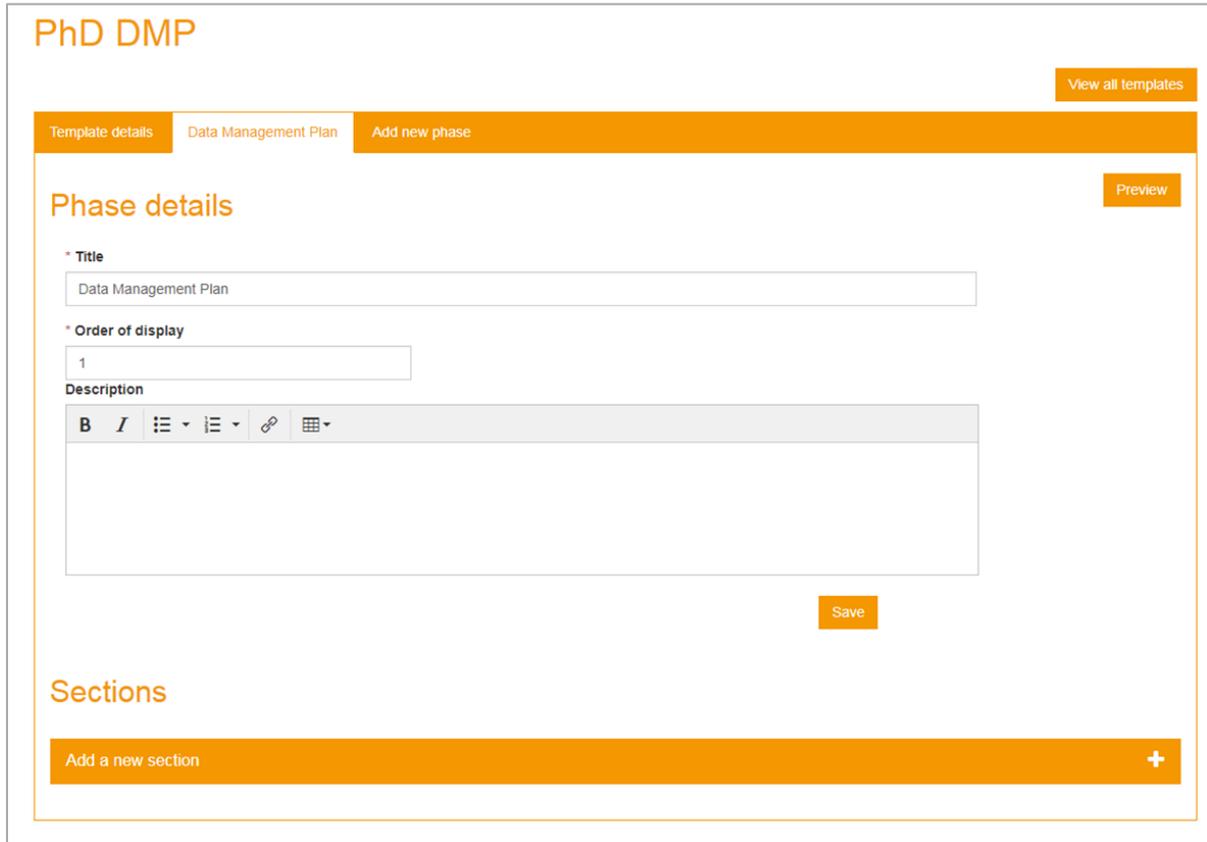
Description

[Save](#)

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

## Add section(s)

Once you have created a phase, you must add at least one section by clicking the header bar to "Add a new section" in the lower right. Sections are useful for grouping related questions (e.g. multiple questions about ethics policies) however the overall structure of your template is up to you.



The screenshot shows the 'PhD DMP' interface. At the top, there is a navigation bar with 'Template details', 'Data Management Plan', and 'Add new phase'. A 'View all templates' button is in the top right. Below this is the 'Phase details' section, which includes a 'Title' field (containing 'Data Management Plan'), an 'Order of display' field (containing '1'), and a 'Description' field with a rich text editor toolbar. A 'Preview' button is in the top right of this section. At the bottom of the 'Phase details' section is a 'Save' button. Below the 'Phase details' section is a 'Sections' section with a prominent orange bar that says 'Add a new section' and a plus sign icon on the right.

If you want to add guidance at a section level, provide this in the 'Section description' field. This guidance will present before any questions for the section.

## Add question(s)

After creating a section, you will see a button on the lower right to "Add question." Clicking this button will open a series of text editors and other options where you can:

- Create question text
- Select the answer format (e.g., text, radio buttons, check boxes with predefined options, etc)
- Provide a default answer (this will pre-populate the answer field for your users)
- Provide an example answer (this will display below the answer box)
- Provide additional guidance text and links (these will appear in the right-hand panel beside each question)
- Select one or more themes

### Sections

Data Management +

#### Section details

\* Title

\* Order of display

Description

**B** *I*    

Please explain your approach to data management by answering these questions

#### Questions

Add a new section +

Continue to add sections and questions as needed to complete your template.

### Publish your template

While editing the template you can click the "Preview" button in the upper right of the phase area to see how it would appear to researchers. When you are satisfied with your template, the final step is to publish it.

Click "View all templates" to return to the main Templates list. Select "Publish" or "Publish changes" from the Actions menu next to the appropriate template.

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Own Templates
Customizable Templates

### Own Templates

All (2)   Published (1)   Unpublished (1)

Template Name	Description	Status	Edited Date	
Glasgow DMP		Published	05-08-2018	Actions▼
PhD DMP	A template to be used by PhD students as part of the new institutional policy	Unpublished	05-08-2018	Actions▼

[Create a template](#)

- Edit
- History
- Publish
- Copy
- Remove

Once you have published a template, this will remain active and visible to end users until you unpublish it. If you want to make changes, you can edit the existing template at any time. This will create a secondary unpublished version, but your original will remain active. When you are ready to publish the changes, the new version will replace the earlier one. Users will always be provided with the latest published version of your template.

If you want to create a second template similar to another, you can "copy" template to generate a clone to edit rather than starting again from scratch.