# Practical exercise: using the admin interface to customise DMPonline

There are a few activities we want you to try out in the admin interface.

1. Create a new template for your organisation
2. Add guidance for your organisation and a sub-unit
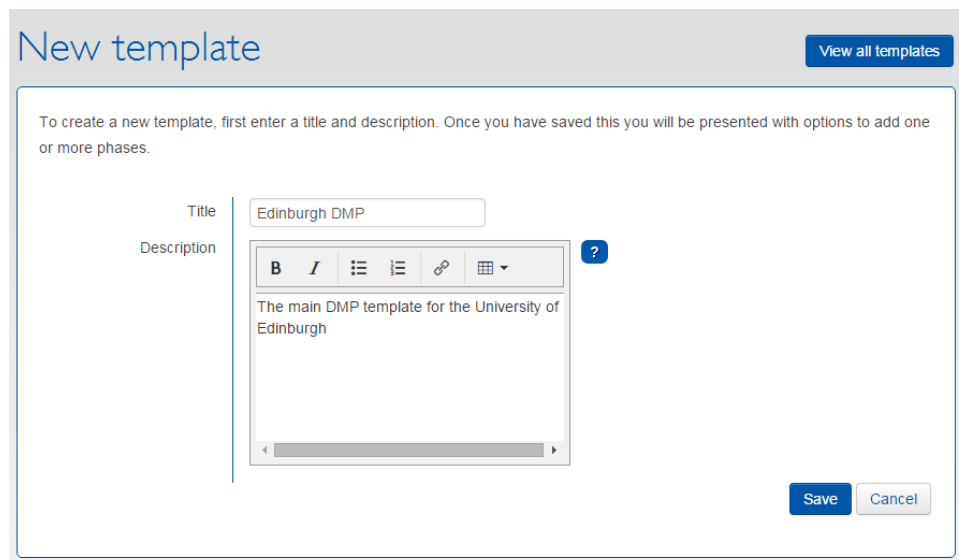3. Customise a funder template

Please navigate to the test site to get started: https://dmponline-test.dcc.ac.uk

To access the admin interface, click on the username link in the top right-hand corner of the screen and select 'Admin area' from the dropdown options. If you don't already have an account on the test site or haven't been granted admin rights yet, please let us know.
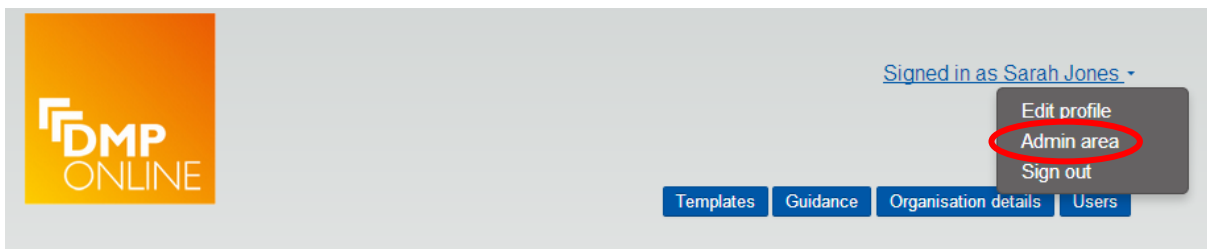
Task 1: Create a new template

The first task is to create a template. Either use one of the examples provided, or make up details of your own. To add a template, click to 'Create a template' and enter a name and description.

You will then be prompted to add a phase. Phases allow you to ask different questions at different stages of the project – for example an initial DMP at grant application stage and a full DMP post-award.

If you only want one phase in your template, call this something generic e.g. 'Edinburgh DMP'. This name is what will be presented in the tab(s) users select when completing the DMP.

Once you have created a phase, an initial version is automatically created. Scroll down to add your first section. Add a name in the box highlighted below and open the concertina using the plus sign to save your entry. You can add further sections using the 'add section' button.

Once you have added a section, you will be presented with options to add individual questions. Try adding a few different types of question e.g. text area, radio buttons or check boxes. You can provide example answers if desired and tag your question with relevant themes so guidance from other sources can be associated and mapped onto it.

Spend some time adding a few questions and sections to try out different things.

To preview your template, scroll back up to the top version table and select 'preview'. Make any further adjustments needed, or if you are happy with it, choose to publish.

To publish, click to edit the version and check the publish checkbox.

Once one version for a particular phase has been published, the overall template can also be published. Both steps need to be undertaken to ensure your template is visible to end users.

To publish the template, navigate back to the 'template' tab and click to 'edit template details'. A similar checkbox to the one above will be presented to publish the template.

Task 2: Add guidance

Before adding your guidance you need to create a guidance group. This determines which level your guidance should apply at. Ordinarily you will be creating guidance that applies to your whole organisation, but you can also create optional subset guidance e.g. for specific departments, institutes or groups. You can also set which template(s) the guidance should display on.

Create a guidance group for your organisation. The name you apply here will display in the front end label for each piece of guidance so choose something short.

Once you have created one or more guidance groups, you can add individual pieces of guidance. Guidance can be added by theme (so it applies across multiple templates) or by question (so it pertains to one specific question in a given template). Writing guidance by theme saves you work overall as there is less to maintain.

If you opt to apply your guidance by themes, select one or more themes from the box. If you opt to apply by question, navigate through the dropdown options that appear to select which funder, phase, version, and section of the template is needed to find the relevant question.

Add a few different pieces of guidance for your institution as a whole and an optional subset.

Task 3: Customise a funder template

On the 'templates' page, you will see a list of all the funder templates in DMPonline. You are able to customise these by:

1. adding a suggested answer or example to each question
2. adding your own section with questions

The view displayed in the admin interface will also show any themed guidance from your organisation that is presented to users when they are completing each funder template. This is based on the themes that each question has been tagged with.

Add one or more example answers, and add a section with a few questions.