DMPonline: customising funder templates

Since most users will be responding to funder requirements, we encourage you to add guidance and example answers to these. When users are creating a DMP, they will be presented with a funder template if one is available rather than the institutional template. If there is information you need to collect that funders don't ask, you can add institutional sections and questions to funder templates.

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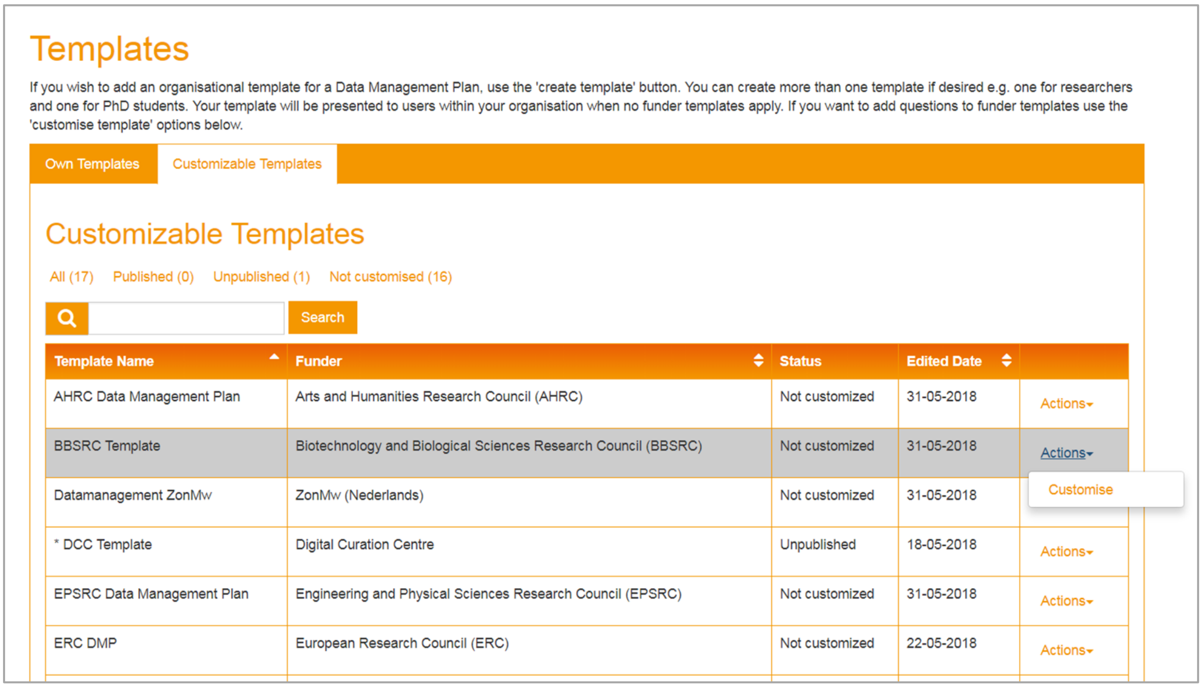
Add annotations

If you want to provide specific guidance for questions in a funder template (rather than themed guidance that applies across them all), you can do so by Customising funder templates. Navigate to "Templates" in the Admin features drop-down menu. There you will see two tabs: 1) Own templates and 2) Customisable templates.

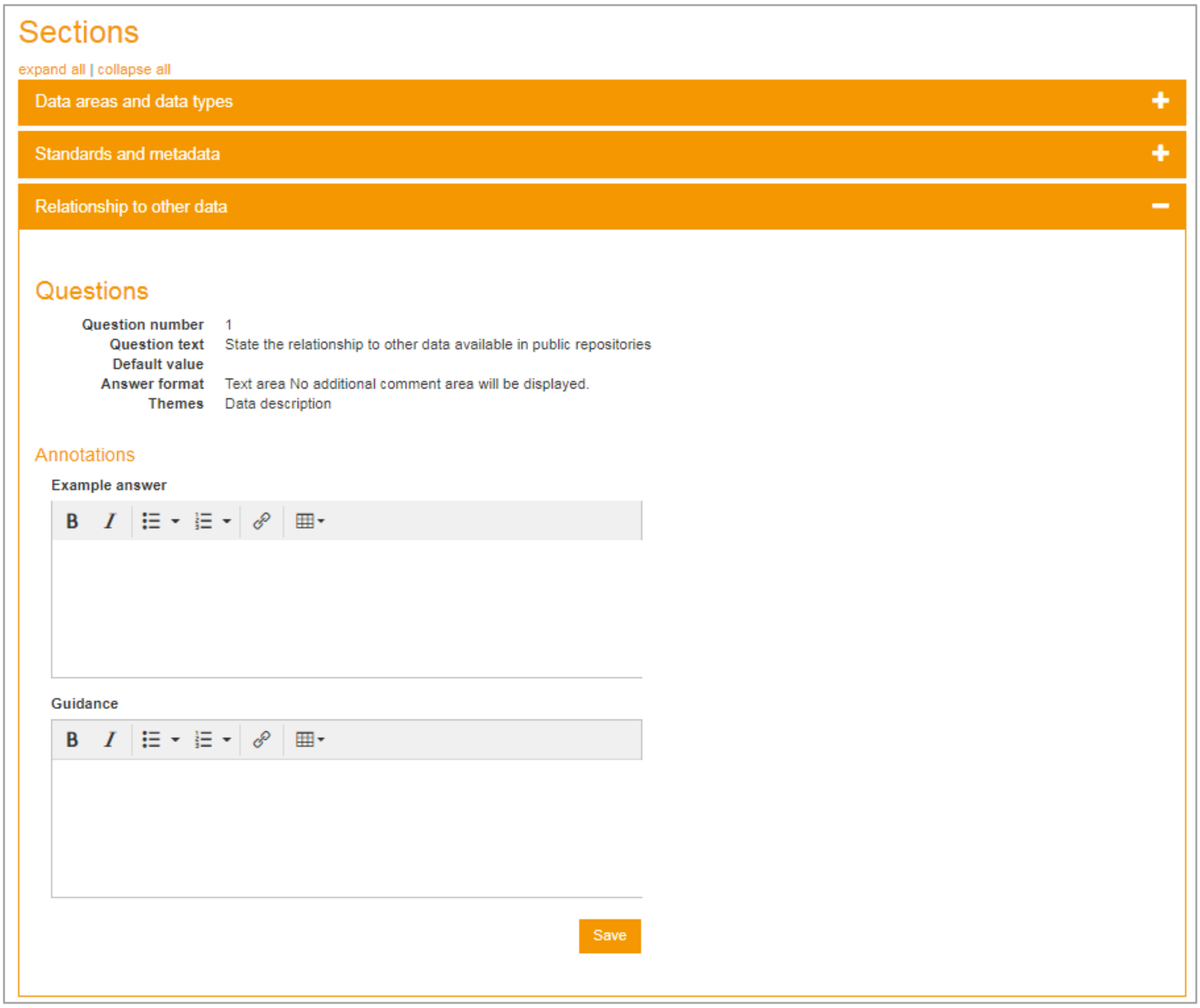


A complete list of funder templates is available in the Customisable templates tab. Click the link to "Customise" in the Actions menu next to any funder template. This will open the template details where you will see an overview and a button to "Customise phase." The majority of funder templates have a single phase. You can click the "Customise phase" button or navigate directly to the relevant tab and add annotations to specific questions.

There are two kinds of question-level customisations:

Example answer: You can provide an example answer for a specific question (e.g. about specific metadata standards or institutional repository details). This will be displayed below the question as a researcher is writing a plan based on that template.

Guidance: You can provide additional guidance text that will appear in the panel to the right of the question. This is in addition to any themed guidance that may display so is for specific information for that particular question.



Add sections

You can also create additional sections with questions that will appear as part of funder templates. One section can be added to the start of a funder template. If you need more than one, or prefer your questions to appear later, multiple sections can be added to the end of a funder template.

Click the bar to "Add a new section" below the funder questions and then add questions as you would when creating a template. You can drag and drop your custom sections to decide where to position them.

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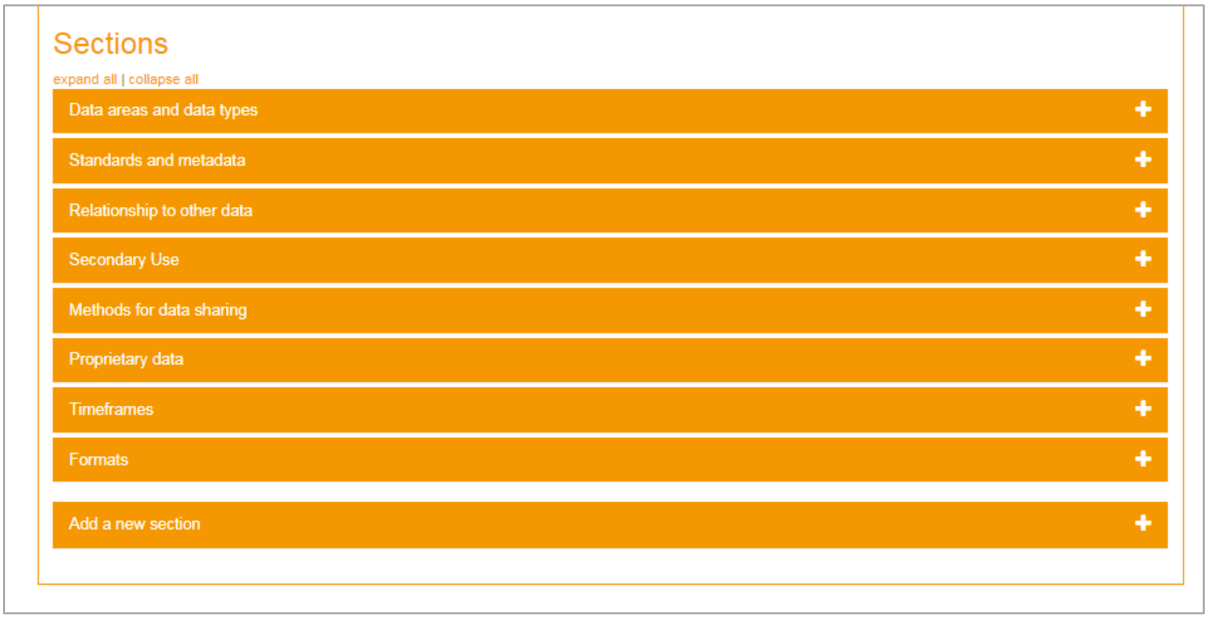
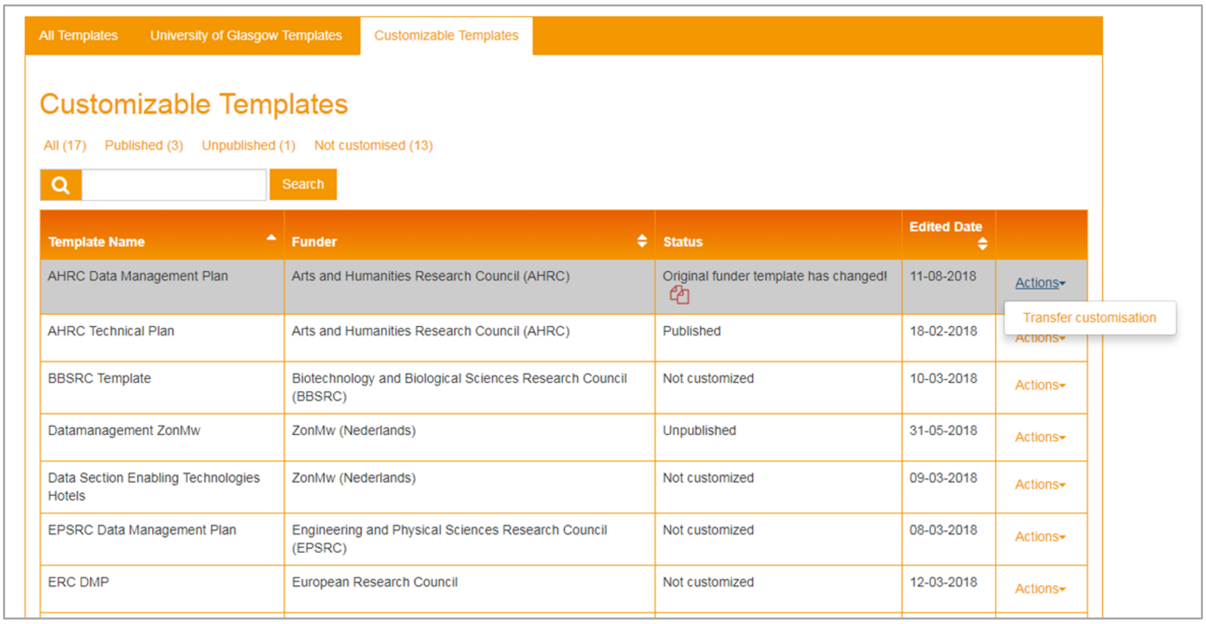


When you are finished customising, do not forget to publish your customisation by selecting "Publish" from the Actions menu next to the customised template.

Transfer customisations

When a funder template is updated by a DMPonline Administrator, any customisations you have created must be transferred to the new version of the template. You will see a notice in the Templates list that the funder template has changed since you customised it. Click the link in the Actions menu to "Transfer customisation" This will copy your annotations and sections through to the new version of the template.



Template Name	Funder	Status	Edited Date	
AHRC Data Management Plan	Arts and Humanities Research Council (AHRC)	Original funder template has changed!	11-08-2018	Actions
AHRC Technical Plan	Arts and Humanities Research Council (AHRC)	Published	18-02-2018	Actions
BBSRC Template	Biotechnology and Biological Sciences Research Council (BBSRC)	Not customized	10-03-2018	Actions
Datamanagement ZonMw	ZonMw (Nederlands)	Unpublished	31-05-2018	Actions
Data Section Enabling Technologies Hotels	ZonMw (Nederlands)	Not customized	09-03-2018	Actions
EPSRC Data Management Plan	Engineering and Physical Sciences Research Council (EPSRC)	Not customized	08-03-2018	Actions
ERC DMP	European Research Council	Not customized	12-03-2018	Actions

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This is a good opportunity to review your customisations to make sure everything is still relevant. The funder may have changed questions or sections so examples, guidance, or additional sections may need revision. Once you are satisfied that everything is in order, click "Publish" in the Actions menu so the customisations will appear on the funder template.

A future enhancement for the near term: we plan to add email alerts and/or a notifications panel to alert you to changes in funder templates. We welcome your feedback about this and any other enhancement requests via the DMPonline helpdesk.