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Introduction

The purpose of this document is to instruct local administrators of the modifications that can be made to DMP Assistant, in order to customize its content and appearance to meet their local institutional needs. The following guide introduces the organizational administrative interface, and demonstrates how it can be used to modify DMP Assistant templates (questions and guidance), as well as the “look and feel” of the GUI.

1. Preparing for customization

To get started with customizing DMP Assistant for your local institution, you will need the following:

- An institutional space within DMP Assistant. This can be requested from the Portage Network by contacting portage@carl-abrc.ca. With an institutional space, a local administrator will have administrative rights to edit basic organizational information and to implement some local customization options. It is recommended that a generic user account be used for administration, as it will reduce the possibility of accidentally transferring administrative privileges between user accounts;
- An individual designated as your institution’s DMP Assistant local administrator;
- Your institution’s logo image with a maximum height of 80 px;
- A CSS file based on the current template and modified according to the instructions provided in Section 2;
- The hexadecimal colour codes for branding colours commonly used by your institution (to be used in the CSS file); and,
2. Accessing and using the organizational administrative interface

As an organization’s local administrator, you can log in and use the organization admin interface to manage your institutional space.

Once you have entered the organizational administrative interface, you will be able to:

1. Edit organization details;
2. View basic information for users associated with your organization (email address, last time of log-in, and the number of plans they have created);
3. Create, edit, manage and delete organization specific templates; and,
4. Create, edit, manage and delete organization specific guidance.

2.1 Accessing the organizational administration interface

Once logged into DMP Assistant with your administrator account, click on Signed in as ... and then select Admin area to access the organizational administration interface.

Figure 1: Click on Admin area to access the organizational administration interface
2.2 Editing organization details

As the local administrator, you may view and edit the information for your organization. Please note, for the time being, not all features are enabled. To edit organizational details:

Click on **Organization details** to view your organization’s basic profile information.
Click on the **Edit** button to edit the organization details.

![Organisation details](image)

*Figure 4: Click on the **Edit** button to edit the organization details.*

In the editable organization details page, local administrators can modify their organization’s name, abbreviation, website URL, descriptive information, as well as upload an institutional logo, top banner image, and customized CSS file (see following sections).

![Organisation details](image)

*Figure 5: The editable organizational details page.*
3. Customizing institutional logos, banners and color schemes

To create a local “look and feel” for DMP Assistant users logged-in with their particular institution, local administrators can modify one (or all) of the following elements: institutional logo; top banner image/color; and, institutional-specific color schemes (see Figure 7). The following guidance outlines these customization processes:
3.1 Preparing logo and banner images

For optimal presentation, your selected institutional/organizational logo image should have a maximum height of 80 px.

The use of a top banner background image (example) is optional. If you choose to use one, the image should have a height between 90 and 160 px for optimal presentation. Alternatively, you can forego the use of a banner image and instead customize the page CSS to select a solid background color for the banner area (see Section 2).

3.2 Uploading images to DMP Assistant

To upload the images, follow the steps below:

1. Login as administrator and follow the steps outlined in Section 1 to access the editable organization details page.
2. Prepare logo and banner images (instructions); customize your CSS file (instructions).
3. Use the interface to upload your customized logo, banner and CSS files into the administrative interface.

Figure 7: An example of a fully customized DMP Assistant interface
3.3 Special notes on interface customization

For technical and administrative purposes, administrators should not modify the CSS code beyond that which is demonstrated in the following section (GUI CSS customization).

Other small changes may be possible on a case-by-case basis. If you require specific changes, please contact portage@carl-abrc.ca.

If a new image or CSS file is uploaded, the existing files will be overwritten. If you decide to switch back to original Portage logo/stylesheet and remove all customizations, please follow the directions on the interface. Check the checkboxes and click on Save to remove uploaded images, and click on the deletion link to remove uploaded CSS file.

4. GUI CSS customization

4.1 Overview

Using McMaster University's customized CSS file as a template, institutions can customize the colour scheme of DMP Assistant page using the CSS hexadecimal scheme. The thoroughly commented CSS template (providing additional annotations for each of the allowed colour changes) can be accessed and downloaded here.

Before you begin editing the CSS file, you will need the hexadecimal colour codes commonly used by your institution. These begin with a # symbol and are followed by
six characters (numbers and/or letters). For example, white is #FFFFFF (or #FFF for short) and light grey is #333333.

Once you have your institution’s colours, you can open the CSS template in a text editor (such as Notepad++) and start replacing the existing colours with your institution’s colours.

To ensure you’re using the correct hexadecimal colour scheme, you can use something like www.color-hex.com to verify.

Before you upload your revised CSS to DMP Assistant, ensure you have saved your file with the .css extension.

4.2 Example: Institutional CSS customization

The following example illustrates and documents the customization process, as applied by a single institution (McMaster University in this case). Screenshots were taken to show modifications made to the CSS code (with line numbers included, for easy reference), as well as the resulting changes to the interface. Each modification is presented in a separate section; screenshots of editable sections of the CSS file are shown first, followed by the resulting changes to the GUI. Please note that each modification has been applied independently, in order to better demonstrate the resulting effects.

4.2.1 Institutional hexadecimal colour codes

For the purposes of this example, McMaster’s hexadecimal colour codes were found by consulting its branding guide. The codes are as follows:

- #79133E-maroon
- #fff-white
- #990033-red

4.2.2 Section heading colour

Replace the hex colour code (#79133E) in the CSS snipped shown below with a desired colour.

```
4
5  h1, h2, h3, h4 { /*Header colour*/
6    color: #79133E;
7  }
```

*Figure 9: Section heading changes in the CSS file*
4.2.3 Footer colour
Modify the hex colour codes for the footer banner (6 character hex code) and the footer text colour (3 character hex code).

```css
footer{
  background-color: #791338; /*footer banner colour*/
}
footer .right_side_footer p{
  color: #fff;
}
.right_side_footer{
  color: #fff; /*footer text colour*/
}
```

Figure 11: Footer colour changes in the CSS file
4.2.4 Top banner text colour

Modify the hex colour code for the three lines shown below:

```css
.header_center { /*Shared Stewardship of Research Data text colour*/
  color: #79133B;
}

#subhead {
  color: #79133B;
  /*Language Setting colour*/
}

.signIn ul li a, .signIn ul li a.active, .signIn ul li a:visited {
  color: #79133B;
  /*Sign in text colour*/
}
```

Figure 12: Resulting footer colour changes in the GUI

Figure 13: CSS file changes for the top banner colour (3 steps)
Figure 14: Resulting footer colour changes in the GUI

4.2.5 Colour of buttons and tables

```css
19 .dmp_toolbar {
    background-color: #79133E;
}

42 body.dmsonline .btn-primary, body.dmsonline .btn-primary:active,
background: #79133E; /*button colour*/

50 body.dmsonline .btn-primary:hover {
    background: #990033; /*button colour when mouse hovers over it*/
}

54 table.dm_table thead{
    background-color: #79133E;
}
```

Figure 15: CSS file changes for the button and table colours (4 steps)
Figure 16: Resulting table and button colour changes in the GUI

4.2.6 Tab colour

Modify the hex colour code in the three lines shown below:

```css
#project-tabs .active a, #project-tabs .active a:active, #project-tabs li a:hover{
    background-color: #79133E;
    border: 1px solid #79133E; /*tab colours*/
}

dmp_details body{ /*tab border colour*/
    border: 2px solid #79133E;
}
```

Figure 17: CSS file changes for tab colour
4.2.7 Question section colour

Modify the hex colour codes for the four lines shown below:

```css
.accordion-group { /* Question box colours */
  background-color: #9133B;
  border-color: #9133B;
}
.accordion-heading { /* Question box colours */
  background-color: #9133B;
}
.section-status { /* Question box colours */
  background-color: #9133B;
}
```

*Figure 18: Resulting tab colour changes in the GUI*

*Figure 19: CSS file changes for section colour*
4.2.8 Guidance and suggestion box colours

Modify the hex colour codes for the three lines shown below:

```css
dw.suggested-answer-border { /*Suggested answer box border colour*/
  border: 1px solid #79133E;
}

.question-guidance .guidance-accordion-body {
  border: 1px solid #79133E; /*Guidance box colour*/
}

.question-guidance .accordion-heading a, .question-guidance .accordion-heading a:hover{
  color: #79133E !important; /*Guidance heading colour*/
}
```

Figure 21: CSS file changes for guidance and suggestion box colours
Figure 22: Resulting guidance and suggestion box colour changes in the GUI

4.2.9 Top banner background colour
To use a customized background color, add the following line to your CSS (replacing #c7e2fa with a hex colour code of your preference).

```css
.dmponline {
  background-color: #c7e2fa;
}
```

5. Template customization and management

The Portage template can be regarded as a generic DMP template that can be used “out of the box” by any researcher. Not all institutions will need nor want to develop an institutional template, but the functionality is available for those who feel it is important for their organization. For those institutions wishing to provide customized templates (questions and guidance) to meet specific needs, the following steps demonstrate how a custom template can be created using the administrative interface.
5.1 Template management

The steps for template management follow the logical sequence of Template->Phase->Version->Section->Questions. Please note that at any point, you can preview the template by clicking on Preview under Actions.

5.1.1 Template

To create a new template, click on Templates on the top navigation, and then click on Create a template:

![Figure 23: The Templates page allows you to view, edit or create new templates.](image)

Provide title and description information for the new template, and then click on Save:

![Figure 24: Inserting title and description for a new template](image)

5.1.2 Phase and version

Phases are used to indicate different stages of a research project (e.g. pre- / during / post-project). The generic Portage Template is not a phased template. To create a single phased template like the generic Portage Template, you only need to add a new phase once. Click on the Add new phase+ tab to add a new phase of the
template. The phase title is what users will see in the tabs when completing a plan. If you only need one phase, you may wish to give it a generic title such as <Your Institution>_ Data Management Questions.

![Test Template](image)

*Figure 25: Adding a phase to a template.*

When a new phase is created, the creation of a new version of the template is triggered. For example, when the new phase is created for a new template, the first version of the template will be automatically created.

To make major changes to a template that has already been published (such as adding a new section or series of questions), you should create a new version. To make small changes such as correcting typos, choose to edit the current version.

Click on **Save** to move on to creating sections and questions.
5.1.3 Sections and questions

To add a new section, enter the section title at the bottom of the `Version editing` page, and click on `Add section`. Use the `+` to expand the section editing window for adding description information and to define the order in which the sections will be displayed.

Figure 26: The template details page.
Figure 27: Adding a new section.
Add questions to each section by selecting **Add question**.

![Image of question creation interface](image)

*Figure 28: Adding a new question.*

When adding questions, you can:

- Use the **Question number** dropdown menu to define the display order of questions within a section: e.g. Question number 1 will be displayed first in the section. By changing the question number, the order in which the questions appear on the template will change accordingly.
- Choose the **Answer format**:
  - *text area* for long paragraphs of text;
  - *text field* for a short text answer;
○ checkbox for presenting options for multiple value selection;
○ radio button for presenting options for single value selection;
○ dropdown list for controlled vocabulary selection;
○ multiple select box for allowing users to select multiple options from a scrollable list using the CTRL key.

● Define default answer for each question. The answer will be displayed in the answer box for users.
● Define a suggested answer for each question. The example provided will be presented above the answer box and can be easily copied/pasted by the user.
● Create question specific guidance. The guidance text entered here will always be displayed alongside the question, no matter what other guidance groups are selected (guidance groups are described in section 3.2.1).

5.1.4 Publishing
Once the sections and questions have been created, select the Published checkbox in the Version editing section to indicate the active version being used within your template. This step is necessary and indicates that the version is active and ready to be published as part of a template which itself must be published before it is made public.

Figure 29: “Publish a version”, the checkbox is selected, then save to publish the template.
Once a version has been marked as *published*, return to the *Template details* tab. Select *Edit template details*.

![Template details tab](image)

*Figure 30: “Template details” tab to access the template details editing page. Remember to first select a version of the template before proceeding to publish.*

![Template details editing page](image)

*Figure 31: “Template details editing” page with the checkbox selected in order to publish the template.*

Once the template is published, your users will see your new template as an available selection when they create a new DMP. The institutional template will be the default template and will be listed first in the dropdown selection menu.
5.2 Adding additional institutional guidance text

In some cases, it may be desirable or necessary to enhance a template’s existing guidance text (e.g., the Portage template guidance) with additional, institutional-specific instructions.

In order to create institution-specific guidance text, local administrators must first create one or more Guidance Groups, to which guidance texts can be associated. Once this is done, the local administrator can generate an institutional guidance frame, which appears alongside the default template guidance in the GUI, by creating a guidance group guidance text.
1. You will need to first create a **Guidance Group** for your institution.

![Guidance group list](image)

**Figure 34:** Guidance group list, allowing the creation of new guidance groups and guidance text.

- You can identify which templates should be associated with a particular guidance group. You could create Portage and institution specific guidance as needed or generic guidance text that is applicable to all templates for users from your institution.
- If the guidance is only meant for a subset of your users, you can save the guidance as an optional subset. Users will be able to select whether or not to display this subset in the *create plan* wizard.

![Guidance group](image)

**Figure 35:** Assigning a guidance group to a template.
2. Once the guidance group is created, create individual guidance text by selecting **Add guidance**. You can draft guidance language to accompany specific questions.

![New guidance](image)

**Figure 36: Creating new guidance text.**

- For guidance by question, you will need to indicate:
  a) the template in which the question is found;
  b) the phase of the template (e.g. phase for early vs. late part of the data management process);
  c) the version of the template;
  d) the section from the template in which the question is found; and,
  e) the question to which the guidance will apply.

5.2.1 Previewing institution specific guidance

![University of Alberta Template](image)

**Figure 37: Click Preview to preview institutional specific guidance.**
5.2.2 Using institution specific guidance

1. On the create plan page, select your institution from the drop down menu.
2. Next, select the template to which the guidance applies.

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 you aren't responding to specific requirements from a funder or an institution, you can choose the Portage Data Stewardship Template. The Portage Data Stewardship Template is based on internationally accepted standards and best practices. It has been prepared and is maintained by a group of research data management experts from research libraries across Canada.

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

You may leave blank or select a different organization to your own. If you leave blank, default Portage DMP template will be used

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.

Create plan

Figure 40: Selecting a template when creating a new plan.

3. Last, select the institution-specific guidance you wish to display (if it has been listed as an optional subset).

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 you aren't responding to specific requirements from a funder or an institution, you can choose the Portage Data Stewardship Template. The Portage Data Stewardship Template is based on internationally accepted standards and best practices. It has been prepared and is maintained by a group of research data management experts from research libraries across Canada.

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

You may leave blank or select a different organization to your own. If you leave blank, default Portage DMP template will be used

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.

Create plan

Figure 41: Enabling additional guidance sources when creating a new plan.
4. Reporting issues/bugs and suggesting new features

All issues, bugs and new feature requests can be submitted via the issues page on DMP Assistant’s GitHub page: https://github.com/ualbertalib/DMPonline_v4/issues. In order to submit issues to the Github page, you must first have a Github user account (can be created at no cost).