

DATA DEPOSIT TOOL: USER GUIDELINE

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1 ACCESSING THE SYSTEM

To access the Data Deposit Tool, navigate to <https://datastore.dirisa.ac.za/metalnx/login/> on your browser. You will be presented with the main home page of the Data Deposit Tool.

Commented [AV1]: Is this the correct URL?

2 REGISTER TO DATA DEPOSIT TOOL

If you do not have a user account, you need to register to be able to use the data deposit tool. To register, you need to provide the following information:

- First Name.
- Last Name.
- Email address. Your Username will be your email address.
- Select your institution from the drop-down list.
- A strong password that is at least 8 characters long and has as a minimum - one lower case, one uppercase character, one number and one special character.

The following details are required in order for you registration to be processed.

The registration form includes the following fields and elements:

- First Name:** Input field with placeholder text "First Name".
- Last Name:** Input field with placeholder text "Last Name".
- Email Address/Username:** Input field with placeholder text "Please Enter Work Email/Institution Address".
- Institution:** Dropdown menu with placeholder text "Select Institution".
- Password:** Input field with placeholder text "Password" and a "Show" button. Below the field, the password strength is indicated as "Very Weak".
- Password Strength:** A list of requirements with red 'x' icons indicating they are not met:
 - At least one lowercase & one uppercase character
 - At least one number (0-9)
 - At least one Special character (!@#\$%^&*)
 - At least 8 characters
- Confirm Password:** Input field with placeholder text "Password" and a "Show" button.
- Agreement:** A checkbox followed by the text "I agree with the [terms and conditions](#) and [privacy policy](#) for Registration."
- reCAPTCHA:** A widget with the text "I'm not a robot" and a "reCAPTCHA" logo.
- Buttons:** A green "Register" button and a blue "Go to login" button with the text "Have an account? Go to login".

Figure 1: Registration Page

Once you have registered, an email is sent to the DIRISA administrators who then approve your registration. Once your account is approved, you will be notified via email.

Nhlamulo: Insert sample screenshot of the email the user receives when their account is approved– can hide personal details. Properly caption and number the figure

3 LOGGING INTO THE SYSTEM

Once your registration has been approved, you will be able to login to the Data Deposit Tool. To login you should use your email address and Username and password. You must click on the 'Login' button to login. The login page is shown in

[Figure 2](#)~~Figure-2~~.

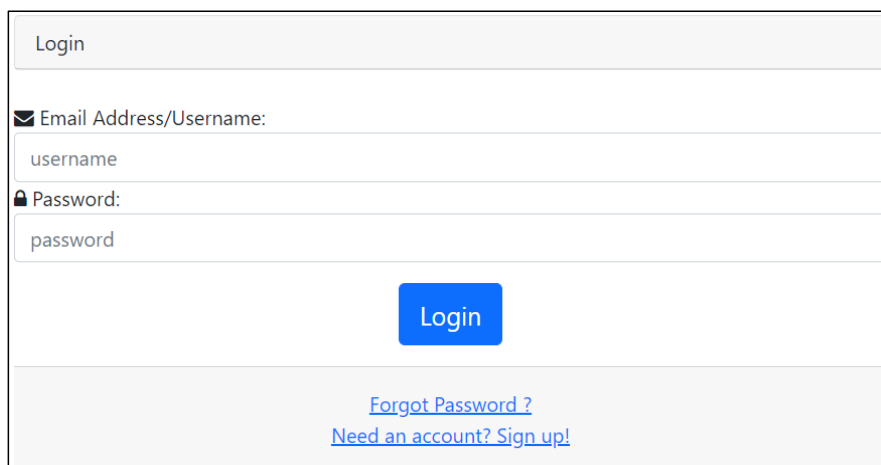
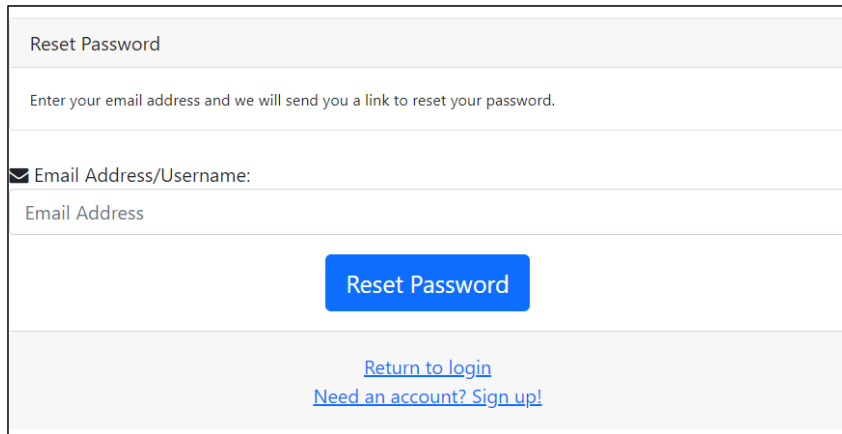


Figure 2: Login Page

4 FORGOT PASSWORD

If you have forgotten your password, you can reset it by clicking on 'Forgot Password' on the login page. You will be asked to enter your email address or username as shown in [Figure 3](#)~~Figure-3~~ and should then, click on the 'Reset Password' button.

A link to change your password will then be sent to your email.



Reset Password

Enter your email address and we will send you a link to reset your password.

✉ Email Address/Username:

Email Address

Reset Password

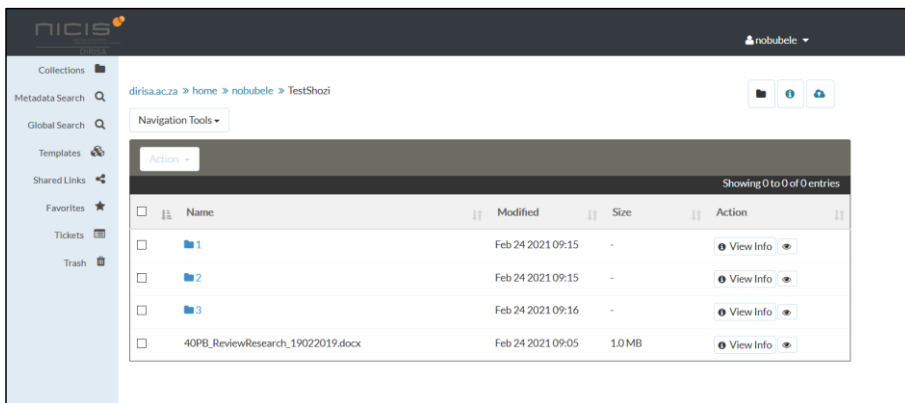
[Return to login](#)

[Need an account? Sign up!](#)

Figure 3: Forgot Password page

5 LANDING PAGE

Once logged in, you will be directed to the landing page as shown in [Figure 4](#)



Name	Modified	Size	Action
1	Feb 24 2021 09:15	-	View Info
2	Feb 24 2021 09:15	-	View Info
3	Feb 24 2021 09:16	-	View Info
40PB_ReviewResearch_19022019.docx	Feb 24 2021 09:05	1.0 MB	View Info

Figure 4: Landing Page

The landing page shows all the data items and the various collections that you might have created. These are only accessible by you unless you created a share or moved the collections or data items to the public space.

For each of the files you are able to see:

- **Name.** This is the name of the file.
- **Modified.** This is the date and timestamp that shows when last the file or collection was modified.
- **Size.** This shows the size of the file or collection.
- **Action.** This allows you to view the properties of the file or collection.

The left panel of the landing page contains the menu of the following items:

- **Collections.** Collections allows you to create folders within folders that you can use to organise your data.
- **Metadata Search.** This allows you to search for data using metadata fields.
- **Global Search.** Allows you to perform a general search on all the available data.
- **Templates.** This allows you to create metadata templates.
- **Shared Links.** Shows all the data items that have been shared with you.
- **Favourites.** Under the favourites page, you can see all the data items you have marked as your favourites.
- **Tickets.** Tickets allows you to create share links.
- **Trash.** All deleted data items are in trash.

6 COLLECTIONS

6.1 Create New Collection

To create a new collection, click on the Collections folder icon at the top right corner of the left panel. A pop-up will appear that requires you to enter the name of the collection. You can tick 'Apply iRODS inheritance' if you want the collection to inherit the properties of the parent collection.

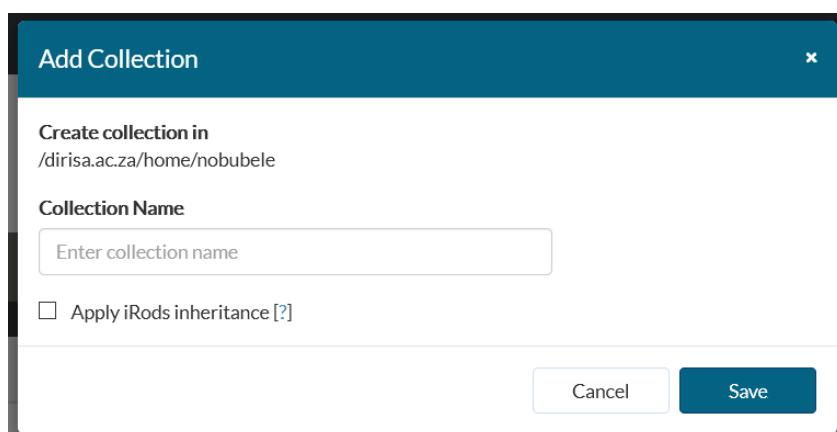


Figure 5: Add Collection Name

Click on the 'Save' button to create the collection.

6.2 Add files to collection

To add files to a collection, you need to click on upload icon and navigate to the file(s) that you need to upload.

Note: The drag and drop function is currently not working yet.

6.3 Actions on collections or files

Each collection or file can be selected and the various actions that can be performed on it, are shown in Figure 6. The actions are briefly described further.

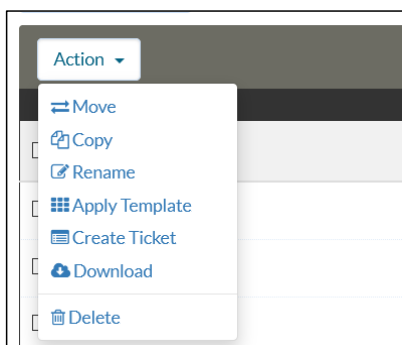


Figure 6: Actions on Collections or files

- **Move.** The file or collection can be moved to another location in iRODS.

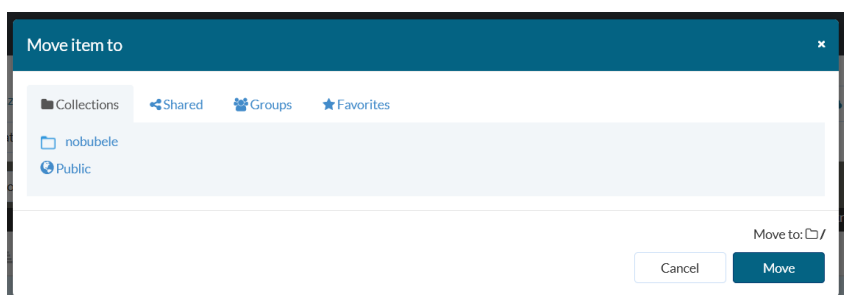


Figure 7: Move files

You should navigate to the desired new location and then click on the 'Move' button.

- **Copy.** The file can be copied to another location.

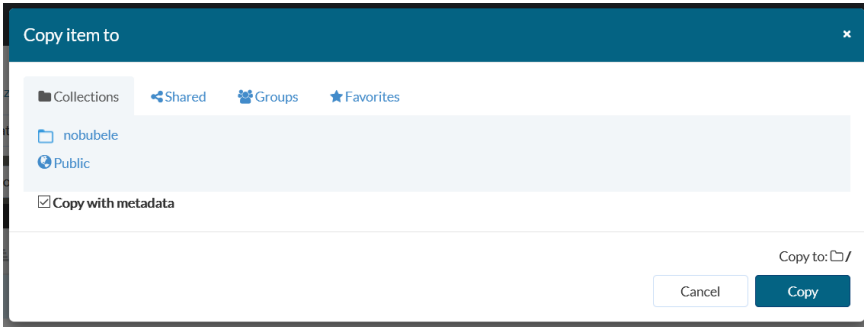


Figure 8: Copy files

The files can be copied to the desired location (with or without its metadata).

- **Rename.** The file can be renamed.
- **Apply template.** You can apply an existing template to a collection or a file.
- **Create Ticket.** You can create a ticket that has either a read or write access.



Figure 9: Newly created ticket

The created ticket can be copied or emailed.

- **Download.** You can download a collection or files.
- **Delete.** Allows you to delete a collection or files.

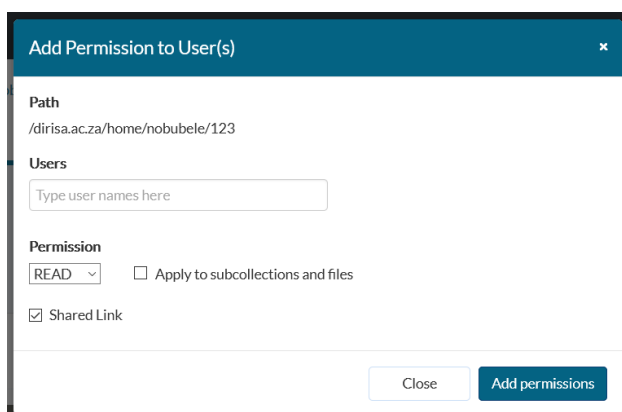
6.4 View Properties of Data Item or Collection

Click on 'View Info' to view the properties of a data item or collection. You can be able to view the general properties and the metadata properties that are linked to a collection.

Commented [AV2]: But WHAT is a "ticket"? Explain briefly

6.4.1 Permissions

You are able to set the permissions for everyone who has access to the data item or collection. To add a person or group, you need to click on '+Permissions' as shown in Figure 10.



The screenshot shows a modal window titled "Add Permission to User(s)". It contains the following fields and controls:

- Path:** A text field containing the path `/dirisa.ac.za/home/nobubele/123`.
- Users:** A text input field with the placeholder text "Type user names here".
- Permission:** A dropdown menu currently set to "READ".
- Apply to subcollections and files:** An unchecked checkbox.
- Shared Link:** A checked checkbox.
- Buttons:** "Close" and "Add permissions" buttons at the bottom right.

Figure 10: Add Permission to User(s)

You need to specify all the users via their usernames and set their respective permissions. There are three permissions available:

- **Read.** Allows user to read.
- **Write.** Allows user to change the data item or collection.
- **Own.** This right is given to the person/people assigned as owners.

You can create automatic shared links by ticking the 'Shared Link' checkbox. Inheritance can also be applied by ticking the 'Apply to subcollections and files'.

Permissions can be added for groups of users if needed.

6.4.2 Metadata

You can add metadata to a file or data collection by clicking on '+Metadata' (Figure 11).

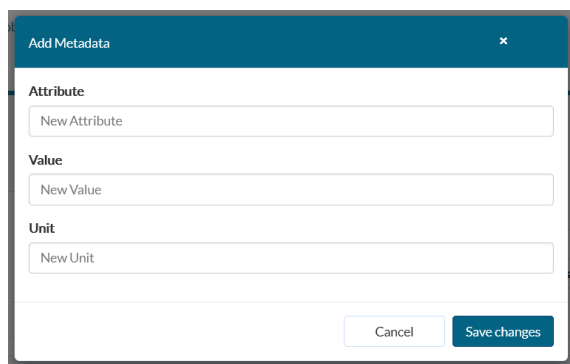


Figure 11: Add Metadata

For each metadata entry, you can provide an attribute, value and unit. The attribute is the name of the metadata field. The value is the metadata you want to enter. Click on 'Save changes'. You can add more metadata fields by repeating the process.

You can also download the metadata as a .csv file.

7 METADATA SEARCH

A metadata search can be performed on available datasets. In the dialogue box (Figure 12), type the name of the metadata field and the value it should contain.

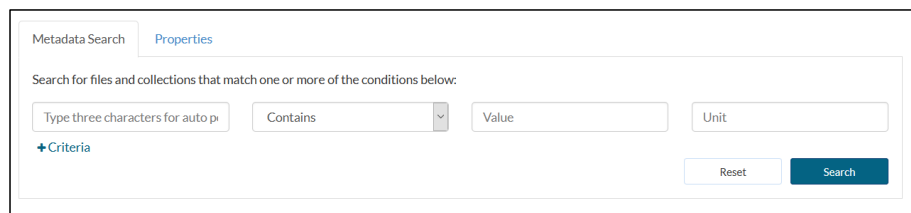


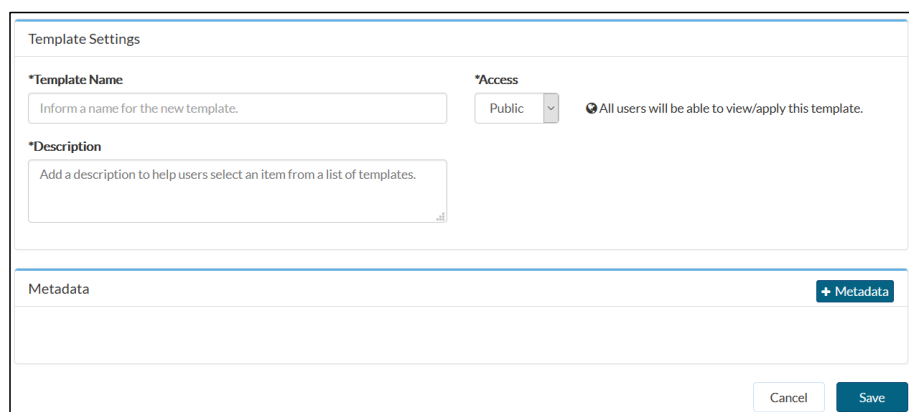
Figure 12: Metadata Search

8 TEMPLATES

You can add your own templates or use existing templates. Templates refer to metadata templates and can be associated with selected files.

8.1 Create Metadata Template

To create metadata template, click on 'Add template'. In the dialogue box (Figure 13), you need to provide a template name and description.



The screenshot shows a 'Template Settings' dialog box. It has three main sections: 'Template Name', 'Access', and 'Description'. The 'Template Name' section has a text input field with the placeholder text 'Inform a name for the new template.'. The 'Access' section has a dropdown menu currently set to 'Public' and a checked checkbox labeled 'All users will be able to view/apply this template.'. The 'Description' section has a text area with the placeholder text 'Add a description to help users select an item from a list of templates.'. Below these sections is a 'Metadata' section with a '+ Metadata' button. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Figure 13: Create Template

You can set the access for the template to either public or private. Public means it is accessible to everyone and private means it is accessible only by you. Adding the metadata fields is similar to the steps showed in Section [6.4.24.4.2](#).

9 SHARED LINKS

Shared links refer to links to data objects that have been shared with you by other users. These links are shown in the shared links page.

10 FAVOURITES

You can mark items and favourites and they will show on this page.

11 TICKETS

Tickets allow you to create shared links. Any ticket that you have created will be shown in the Tickets page.

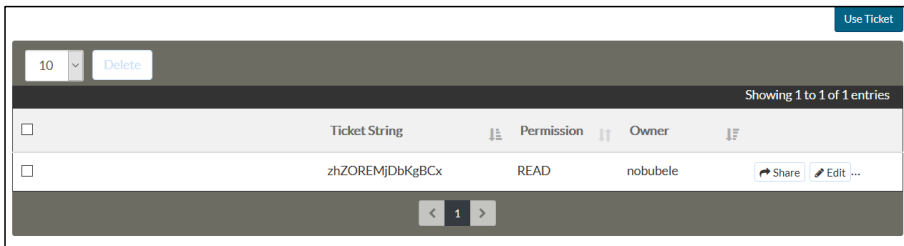


Figure 14: Ticket homepage

11.1 Use Ticket

You can create a ticket by providing a ticket string and ticket path (Figure 15). You then press on the 'Ticket Access' button.

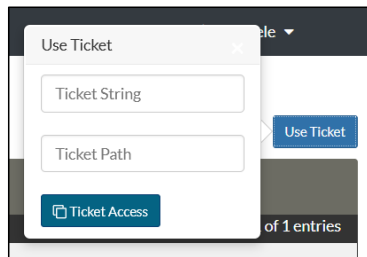


Figure 15: Use Ticket

11.2 Share Ticket

You can share a ticket by emailing the ticket details. This is done by clicking on the 'Email' button (Figure 16). The details of the ticket can also be copied.

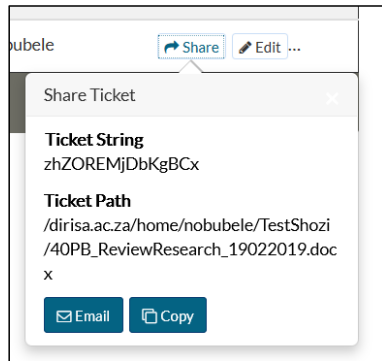


Figure 16: Share Ticket

11.3 Edit Ticket

You can edit the ticket by changing the permission between Read or Write and clicking on 'Modify ticket' button.

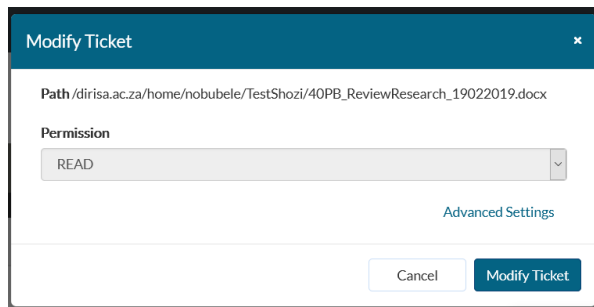


Figure 17: Edit Ticket

12 TRASH

Any collections or files you have deleted, are kept in the trash folder unless you manually delete them from this folder.

--- End of Guide ---