



# Repository Module

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# Agenda

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Introduction to Data Repository module

Capabilities of Data Repository module

Demonstration of Data Repository module

Data Repository module exercises



# Introduction

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## Data Repository Module Functions and Permissions



Data Repository

- Define and manage study information and access
  - Submit studies
- Contribute, upload, and store research data
  - View details of submitted studies
  - Data is housed by study



# Data Repository module capabilities

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- View/search studies
- Create a study
- Edit a study
- Search studies
- Submit data
- Download data



# <Data Repository Module Demonstration>

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# View, Create, Approve, and Edit a Study

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# View/search studies

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1. Click on the “Data Repository” icon from the “Workspace” landing page or from the top navigation.
2. By default, you are taken to the “View Studies” page.
3. If already in the “Data Repository” module on a different page, click on the “menu” icon and then select “View Studies”.

## Notes:

- This page shows studies that the user has permissions to view.
- User can filter studies by Ownership, Data Submission Status, and Data Type.
- User can search by Study Title, Study ID, Principle Investigator (PI), and by the Permission Type that the user holds for a particular study (Owner, Admin, Read, Write).



# Create a study

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1. From the “Data Repository” menu, click “Create Study”.
2. Complete all required fields for the general study details. Make sure to expand the accordions below and fill out required fields.
  - All studies **must** have a Primary Principal Investigator under “Study Research Management”
  - All studies **must** have a primary site under “Study Information”
  - All studies **must** have a start and end date under “Study Information”
  - All studies **must** have a funding source under “Study Information”
  - All studies **must** have an approved submission document attached.
3. If available, add the form structures intended for use in the study under “Study Form Structure”.
4. Click “Submit Request” button





# Approve a study (admin)

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1. From the “Data Repository” menu, click “Data Repository Administration”
2. Click on the study from the table needing approval.
3. Provide a reason for approval and click the “Approve” button to approve the study.

**Note:** Now the study owner can edit a study (manage documentation, manage datasets, and grant permissions to others for the study).



# Edit a study

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*A user can edit a study that they have permission to edit.*

1. From the “View Studies” page, click on the study to edit.
2. Click the “Edit” button to edit details of the study. Use the chevrons at the top to navigate through the study metadata (1. Details, 2. Manage Documentation, 3. Manage Datasets, 4. Grant Permissions) and edit the study.

Notes:

- Under “3. Manage Datasets” the user can request a change to the status of datasets (e.g., shared to private).
- Under “4. Grant Permissions” the user can give permissions to other system users.



# Study permissions

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*Users can have one of the following permissions for an individual study:*

- **Read** – user can view the study.
- **Write** – user can view the study, edit study details, manage documentation, manage data sets.
- **Admin/Owner** – View the study, edit study details, manage documentation, manage datasets and grant permissions. (Only one owner is allowed).



Validate, submit, view, and download data

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# Validation/Submission Tool

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Purpose: To validate data and then upload it to the repository to a specific study.

Two components:

## 1) Validation

- Verifies that data submitted against a form structure conforms to the required format and range values as defined in the Dictionary.
- A report is created highlighting discrepancies/errors. If errors are found, a submission package cannot be created.
- Data must be submitted as a CSV.

## 2) Submission

- After successful validation of data in a form structure, a submission package is created.
- Data is then uploaded to the study selected in the Data Repository.



# Prepare data

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1. Locate and export the form structure(s) you wish to use to collect data for your study against as a CSV. (Also download the data element report if you need it)
2. Enter data for each subject in the form(s).

**Note 1:** Each subject requires a GUID or Pseudo GUID, so use the GUID tool to generate these for each subject if you have not already. For each line with a GUID, include an “x” in the “record” column.

*This will need to be re-done if moving data from the demo environment to the production environment. It may be useful to map a subject ID to a PseudoGUID.*



# Validate data

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1. Launch the Submission tool
2. Click “Browse” to locate the folder with the data you want to upload and click “Open”.  
**Note:** Recommend storing data in a separate folder.
3. Click “Load Files”
4. Select the file(s) to validate (should say “Form Structure” under the “Type” column) and click the “Include Files” button.
5. Select all the other files you do NOT want to validate and click the “Exclude Files” button.
6. Click the “Validate Files” button. Errors in files will be shown in the window under “Description”. The errors must be fixed prior to uploading the data.



# Submit/Upload data

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1. Once the files contain no errors, click on the “Build Submission Package” button on the “Validation Tool” tab of the Submission tool.
2. Once complete, select the study to upload data to under the “Upload Tool” tab of the Submission tool. You will only see your own studies or studies you have access to.

**Note: Make sure to give your dataset a name with context.**

3. Click the “Start Submission Upload” button to begin upload.
4. Click “Ok” on prompts that appear.
5. Verify under “Upload Progress” that all items are at 100% and that under “Status” the status is “Complete”.





# View data

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1. Locate and click on your study in the Data Repository.
2. Expand the “Dataset Submissions” accordion and verify that your dataset submission appears.
3. Click on dataset and click “Add to Download Queue”.
4. Refresh the screen and verify that under “Data Access Report” it shows the dataset and user name of the person who accessed the dataset.

**Note:** Data will not be visible in the query tool until the next business day.



# Download data

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1. From the Data Repository menu, click “Download Tool”.
2. Launch the “Download Tool” by clicking the button.
3. Once the download tool opens, select a folder where you want to download the data.
4. Check the box next to the data you want to download.
5. Files available to download include the data as a CSV file, the data as an XML file, and the form structure mapping.
6. Click the “Start Download” button to begin downloading the data.
7. Navigate to the folder selected in step 3 above and verify that your data downloaded.



# Miscellaneous

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# Request to share/archive/delete data

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1. Open your study with the data
2. Click on “3. Manage datasets.”
3. Click the study to manage sharing status.



# Make Study Public/Private (admin)

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1. From the Data Repository menu, select “Data Repository Administration”.
2. Locate the study you want to change the status of and click on it.
3. Under the “Administrative Functionality” accordion, select to change the study to a Private or Public study.
4. Click the “Close” button at the bottom of the screen.



# Assign DOI (admin)

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1. From the Data Repository menu, select “Data Repository Administration”.
2. Locate the study you want to assign a DOI to and click to open the study.
3. Under the “Administrative Functionality” accordion, click the “Assign DOI” button.
4. Click “OK” when the DOI prompt appears.



# <Data Repository Module Exercises>

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