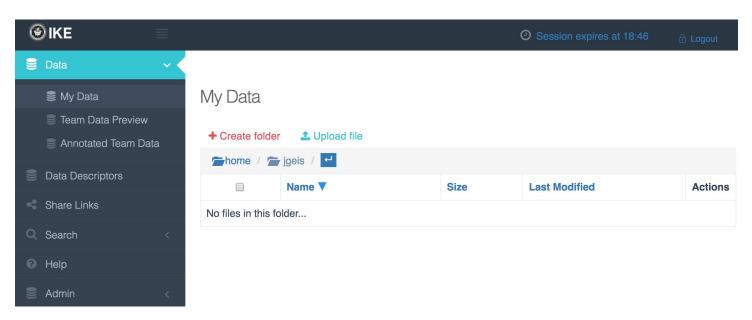# Walkthrough

This will take you through the "typical" process of using the `Ike ToGo system. This is written from the viewpoint of a brand-new user who has never logged in to the sytem who wants to log in, upload data, create a directory structure, move data around, and see the data of their `Ike Wai team-mates.

Please note that this is supported on Chrome and Firefox. Safari has known issues, so it is not recommended.

To start, you go to `Ike ToGo (http://ikewai.its.hawaii.edu).

Enter your UH username and password here and click the 'Login' button. After logging in, you will be taken to the "My Data" page:
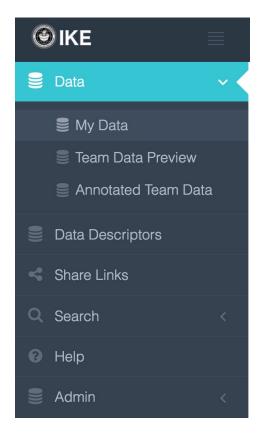

The "My Data" page is where all your personal data will be stored. It is essentially your "home directory" in the `Ike ToGo system. All files uploaded to here are under your control. You will be able to copy, move, rename, delete, and

download all files you place here. Please note that your `Ike Wai team-mates will be able to view anything you upload, but they will not be able to do anything with it other than download.

In the case of a research group, at your request, we can set up the My Data section to give all members of your group equal access, so this would become a shared directory for all in your group and all members would have equal permissions on all files, regardless of which member of the group uploaded the data. So in this situation, although you uploaded a file, another member of your group could rename, move, or even delete the file.

Going over the page itself, notice the sidebar on the left hand side of the screen.

This is the primary means of navigating the site. The main tabs are: Data, Data Descriptors, Share Links, Search, and Help. You may notice that the sidebar screenshot includes a final item, "Admin," this is only for the site administrators. Some of these main tabs have sub-tabs. Here is a brief discussion of each tab and sub-tab. Each of these will be discussed in further detail later in this walkthrough.

- Data:
    - My Data: your home directory.
    - Team Data Preview: everyone's home directories, allowing you to see, but not modify, what your team members are working on.
    - Annotated Team Data: all annotated and "published" files, meaning the owner/author of the data indicated the data is in a good state for others to use.
- Data Descriptors: all existing Data Descriptors. A Data Descriptor is a general set of fields that you fill out about your file/data to assist others who may be interested in using that data.
- Share Links: all share links that you currently have. A share link is a url that you can email someone giving them access to a specific file
- Search: Has three sub-tabs allowing you to search the Annotated team data in different ways.
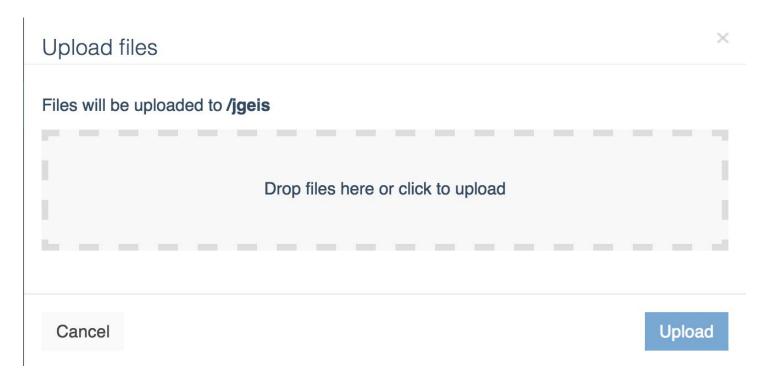- Help: takes you to these help pages.

If you need to conserve real-estate and would like to hide the sidebar, click the little icon that looks like 4 horizontal

lines. For more about the sidebar see "how do show/hide the sidebar" question of the FAQ. For the rest of the walkthrough, to save screen space, the sidebar will be minimized so it will not be included in the screen shots.
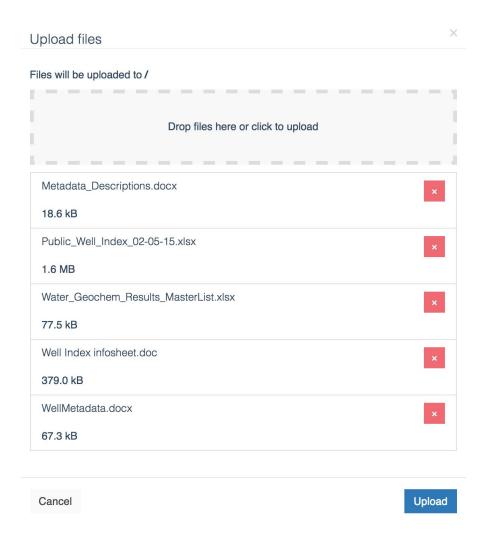
When you first log in, it is completely empty, so your first act is to upload some data. Click on the "upload file" button in the top left corner of the page, under the "My Data" header.

My Data

+ Create folder   **⬆ Upload file**

This brings up the upload files box:

Upload files   ✕

Files will be uploaded to /jgeis

Drop files here or click to upload

Cancel   Upload

Drag your files and folders into this box, or click in the shaded area to bring up your computer's file manager system to select the files to upload. As files are added, you will see them listed:

Upload files

×

Files will be uploaded to /

Drop files here or click to upload

Metadata_Descriptions.docx 18.6 kB	×
Public_Well_Index_02-05-15.xlsx 1.6 MB	×
Water_Geochem_Results_MasterList.xlsx 77.5 kB	×
Well Index infosheet.doc 379.0 kB	×
WellMetadata.docx 67.3 kB	×

Cancel   Upload

Once all your files are included, click the "Upload" button in the bottom right corner of the box and your files will be uploaded to your directory. Progress for larger files will show a percentage of completion until finished. Once the upload is complete, the upload window goes away and you can see your data in your directory.
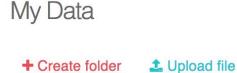
One thing to note in this image is the "Size" column. This column may not be visible to you on your screen depending on how big you make your browser window. In fact, due to the current size of this browser window, there are additional columns that are not being shown: "Last Modified" and "Status," which indicates if the file has been published or not.

Once you have data in your home directory, if it wasn't uploaded with any folder structure, you may want to create some. To create a directory, click on the "Create" button that is located next to the "Upload" button you used earlier.

This will bring up the following box in which you enter the name you want for the new folder, for this example, it's named "Metadata," and click the "Create" button.
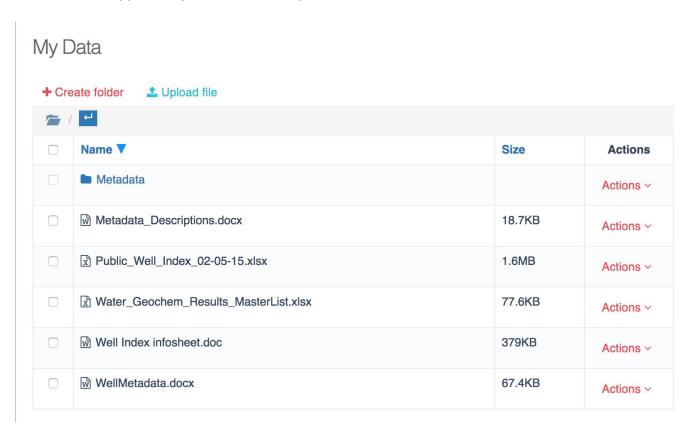
Create folder   ✕

Folder name

Metadata

Cancel   **Create**
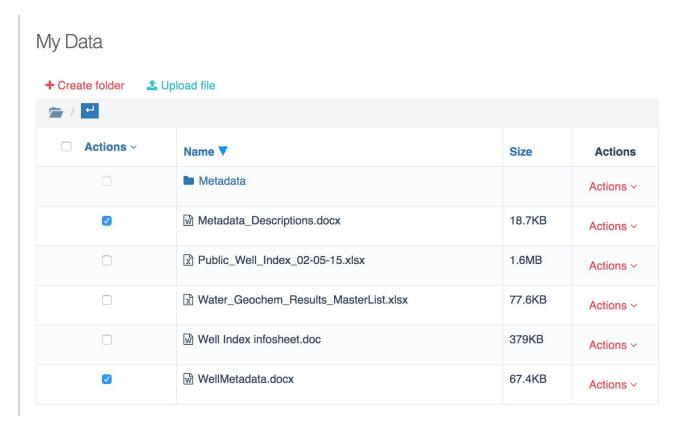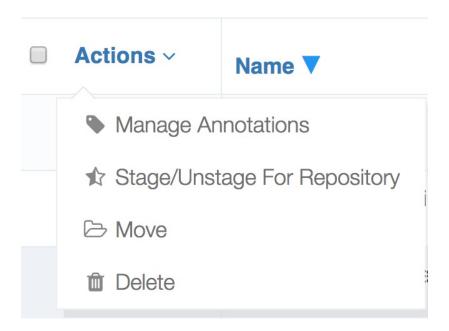
The folder now appears in your home directory.

My Data

+ Create folder   **⬆ Upload file**

📁 / ↵

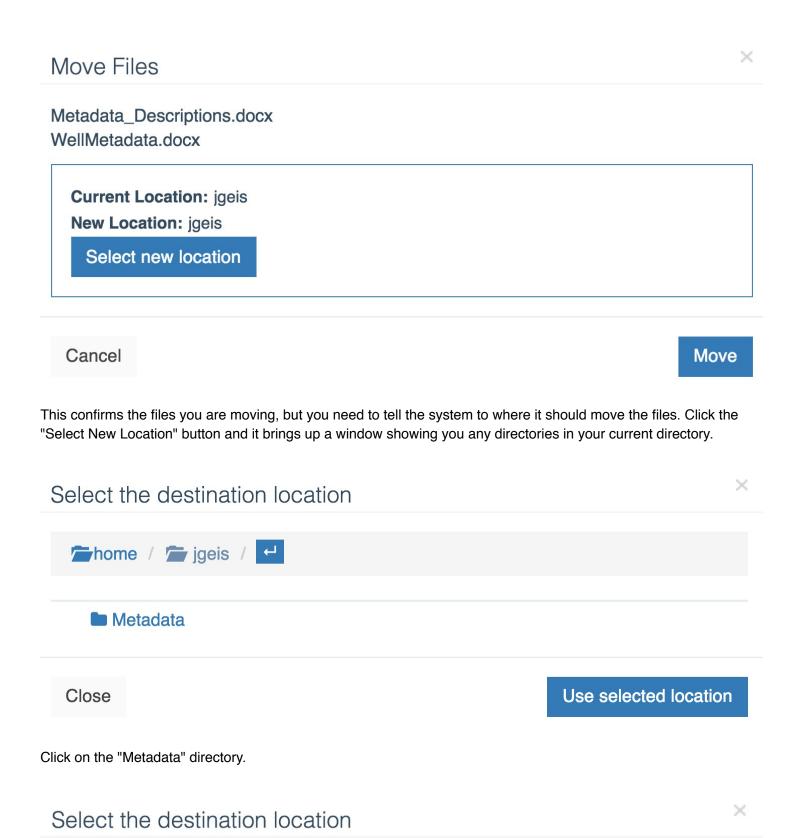| ☐	Name ▼	Size	Actions
☐	📁 Metadata		Actions ⌄
☐	📄 Metadata_Descriptions.docx	18.7KB	Actions ⌄
☐	📄 Public_Well_Index_02-05-15.xlsx	1.6MB	Actions ⌄
☐	📄 Water_Geochem_Results_MasterList.xlsx	77.6KB	Actions ⌄
☐	📄 Well Index infosheet.doc	379KB	Actions ⌄
☐	📄 WellMetadata.docx	67.4KB	Actions ⌄

Next, you move some of your files to the new directory. First, check the box to the left of all the files to be moved.

My Data

+ Create folder   ⬆ Upload file

📂 / ↵

☐ Actions ⌄	Name ▼	Size	Actions
☐	📁 Metadata		Actions ⌄
☑	📄 Metadata_Descriptions.docx	18.7KB	Actions ⌄
☐	📄 Public_Well_Index_02-05-15.xlsx	1.6MB	Actions ⌄
☐	📄 Water_Geochem_Results_MasterList.xlsx	77.6KB	Actions ⌄
☐	📄 Well Index infosheet.doc	379KB	Actions ⌄
☑	📄 WellMetadata.docx	67.4KB	Actions ⌄

After you have selected your files to be moved in to your new directory, click the "Actions" menu button at the top left of the files area. This shows a dropdown menu of all actions that can be done on multiple files. All these actions will be covered later in this document.

☐ **Actions** ⌄   **Name** ▼

🏷 Manage Annotations

⭐ Stage/Unstage For Repository

📂 Move

🗑 Delete

Click the "Move" item in the menu and it brings up a dialog in which you will select the new location for the selected files.

Move Files

Metadata_Descriptions.docx
WellMetadata.docx

Current Location: jgeis
New Location: jgeis

Select new location

Cancel   **Move**

This confirms the files you are moving, but you need to tell the system to where it should move the files. Click the "Select New Location" button and it brings up a window showing you any directories in your current directory.

Select the destination location

📂home / 📂 jgeis / ↵

📁 Metadata

Close   **Use selected location**

Click on the "Metadata" directory.

Select the destination location

📂home / 📂 jgeis / 📂 Metadata / ↵

Close   **Use selected location**

Notice that the metadata directory shows up in a different location and that there are no sub-directories shown as it has none. Click "Use Selected location" and it will close the location selection dialog and you see the Move dialog again, now showing the new destination for your files.

Move Files   ✕

Metadata_Descriptions.docx
WellMetadata.docx

Current Location: jgeis
New Location: /jgeis/Metadata

[Select new location]

| Cancel | Move |

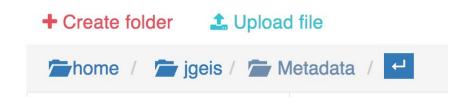Click the "Move" button and the move takes place, the dialog goes away and you can see the changes in your directory.

My Data

+ Create folder   **⬆ Upload file**

📁 / ↵

	Name ▼	Size	Actions
☐	📁 Metadata		Actions ⌄
☐	📄 Public_Well_Index_02-05-15.xlsx	1.6MB	Actions ⌄
☐	📄 Water_Geochem_Results_MasterList.xlsx	77.6KB	Actions ⌄
☐	📄 Well Index infosheet.doc	379KB	Actions ⌄

Click on the metadata directory to see the moved files.

My Data

+ Create folder   **⬆ Upload file**

📁 Metadata / ↵

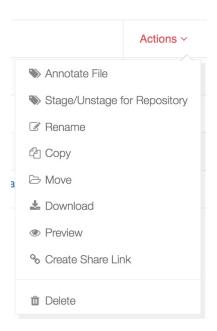| ☐	Name ▼	Size	Actions
☐	📄 Metadata_Descriptions.docx	18.7KB	Actions ⌄
☐	📄 WellMetadata.docx	67.4KB	Actions ⌄

To return back to your home directory, either click the "My Data" tab, or click on your name in the breadcrumbs, located directly between the "Create folder" button and the "Actions" menu:

+ Create folder   **⬆ Upload file**

📁home / 📁 jgeis / 📁 Metadata / ↵

If, instead, you wanted to move a single file, click on the "Actions" button to the right in the same row as the file you want to move. A dropdown menu appears from which you can select the "Move" item and then follow the same process as above.

Actions ⌄

🏷 Annotate File

🏷 Stage/Unstage for Repository

✎ Rename

📑 Copy

📂 Move

⬇ Download

👁 Preview

🔗 Create Share Link

🗑 Delete

Note the other actions available on this menu: Manage Annotations, Rename, Copy, Move, Download, Create Share Link, and Delete.
- Manage Annotations: create/remove associations between the file and metadata, for now, data descriptors.
- Rename: opens a dialog into which you can enter a new name for the file.
- Copy: opens a dialog that acts the same as the Move process, but it includes a field in which you can enter a new name for the copied file. This allows you to make the copy in the same directory if you want, although you

can also save the copy in a different directory if you choose.

- Move: opens a dialog that allows you to move the file to a new location.
- Download: a single action that automatically downloads the file to your computer.
- Create Share Link: generates a url that you can email someone giving them access to the file, regardless of their group or UH affiliations.
- Delete: provides an "are you sure" prompt which then deletes the file if you reply in the affirmative.

After uploading and arranging your data, you may want to see what your team-mates have been doing. So open the sidebar and click "Team Data Preview" under the "Data" tab.

Team Data Preview

	Name ▼	Size	Actions
☐	📁 _davidls		
☐	📁 _gwenj		
☐	📁 _jgeis		
☐	📁 _omeier		
☐	📁 seanbc		
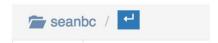
While in this screenshot you see all members of the CyberInfrastructure team, you will instead see all members of the `Ike Wai team. For the purposes of this example, we'll go with what we see here. If you click on anyone's name, you will be able to see their data. You won't be able to do anything with it other than download it. For this example, if you clicked on "seanbc," you would see the following.

Team Data Preview

📂 seanbc / ↵

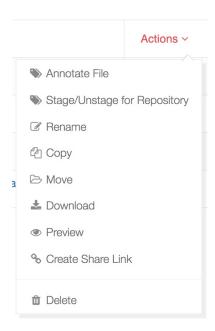|	Name ▼	Size	Actions
☐	📁 mytesting		
☐	📄 20-06-45	3.7KB	Actions ⌄
☐	📄 PEARC-poster.pdf	928.6KB	Actions ⌄
☐	📄 test		Actions ⌄
☐	📄 UH-PEARC-poster.pdf	931.1KB	Actions ⌄

Notice the path and button at the top of the file section, just under the "Team Data Preview" header.

Team Data Preview

📁 seanbc / ↵

The path shows the name of the user whose directory you are looking at. The little arrow button next to the name allows you to go back up to the main directory where you can choose to explore other directories. Please note that even if you click on your own name on the "Team Data Preview" page, you will still only have read access. To make changes to your own files, you need to go back to your "My Data" page.

After uploading some data and getting comfortable with the file management interface, it's time to start adding metadata to your files. Go back to the "My Data" page by clicking on the "My Data" sidebar item. Click on the "Actions" menu to the right of one of your files. Then click on the "Manage Annotations" item.

Actions ⌄

🏷 Annotate File

🏷 Stage/Unstage for Repository

✏ Rename

🗗 Copy

📂 Move

⬇ Download

👁 Preview

🔗 Create Share Link

🗑 Delete

Since this file has no metadata already associated with it, this is what you will see:

Associate This File With Data Descriptors:

⬜ Public_Well_Index_02-05-15.xlsx

No Data Descriptors are associated with this file.

Data Descriptors available for association:

🔍 Show Search   ➕ Create New Data Descriptor

Total Objects: 1000

Well Data: //well_data/3-1805-011.pdf		Associate 🔗	Clone ➕
lightnig-talk-ikewaiAllhand-Aug242017.pptx		Associate 🔗	Clone ➕
Well Data - 3-1642-001.pdf		Associate 🔗	Clone ➕
IkeWaiToGo-12022016-R2.pptx		Associate 🔗	Clone ➕

At the very top you can see the file that was selected. If you selected multiple files and picked the "Manage Annotations" items from the group action menu, you would see all the chosen files listed there. Below that is the section that would display any data descriptors that are already association with the selected file(s). Since there aren't any associations yet, it states there are no data descriptors for this file. The final section shows existing data descriptors that you can clone (and edit) or just associate directly with your file(s).

A data descriptor is a basic description of your data. The intent is to provide the bare minimum level of information that would allow other researchers to find, understand, and trust your data.

A file can have multiple data descriptors, and each data descriptor can be associated with multiple files. For example, say you did a well sampling trip, and each well result was a separate file. You might have one overall data descriptor that you associate with all the files, indicating the date(s) of the trip, the island, who took the samples, or anything else that applies to all the data. Then you might make different data descriptors for each location describing the time of the sample, who was involved at that particular location, what was collected, the importance of that location, or whatever else is unique to that set of files.

For this walkthrough, we will create a new data descriptor for our data, to start, click the "Create New Data Descriptor" button.

Data Descriptor   X

Associated Files:

Required

Title:*⑦

[   ]

Author(s):*⑦

[Select author(s)...   ]

+Create New Author

Subject/Keywords/Search terms:⑦

[Enter terms you would use to search for this data...   ]

Data Collection Start Date:⑦

[Select start date of work referenced in file…   📅]

Data Collection End Date:⑦

[Select end date of work referenced in file…   📅]

Format:⑦

[Select file format(s)...   ]

Summary:⑦

[Enter abstract or text describing this resource   ]

Close   **Save and go to step 2...**

Next to each label is a tooltip icon that tells you about the field when you click on it. The first two values, title and author, are required. For fields that ask for the names of people or organizations, you can either select from one of the existing values or you can create your own. To create a new person or organization, click on the "Add" button below the field in which you wanted to be added. For person, you will see this form:

Create Metadata Object

Person

First Name

Last Name

Email

ORCID

Organization

Cancel   Save

For organization, you will see this form:

Create Metadata Object

Organization

Organization Name

Email

Address

Phone

Web Site

| Cancel | | Save |

Add some values to the form and click save. The new record shows up as selected in your form. You can remove any entries by clicking the "x" button next to the entry you want to remove.

Creator: *⑦

Geis, Jennifer ✕

+Add Creator

When you are finished editing your data descriptor, click the "Save and go to step 2" button at the bottom of the form.

Now you see the buttons "Select Locations" and "Select Variables".

Data Descriptor

X
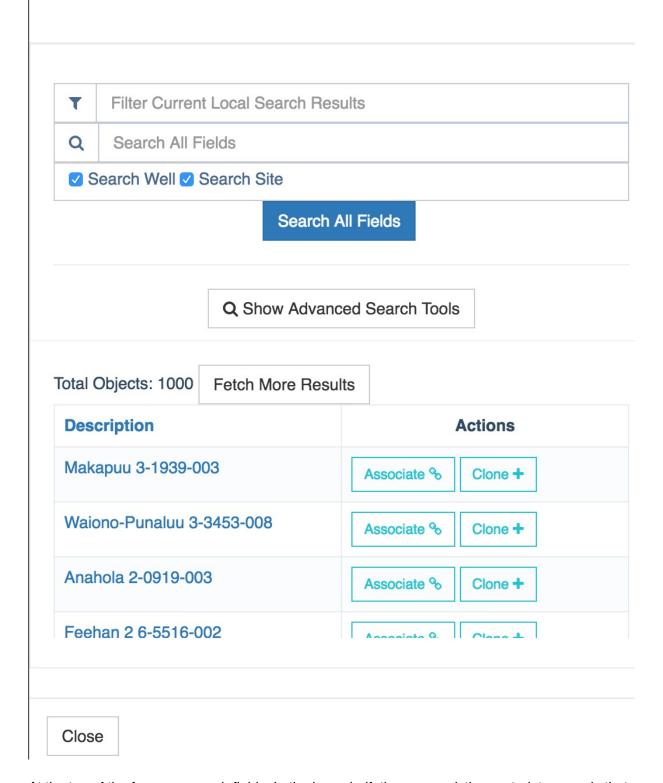
Associated Files:
/ikewai-working-sean//jgeis/wells/Public_Well_Index_02-05-15.xlsx

Select Location(s)

Select Variable(s)

Close

Finish

To add existing Location or Variable metadata to your file, click on the "Select Locations" or "Select Variables" buttons in the Data Descriptor form. In each case, you will see something similar to this.

Select Location(s)

▼	Filter Current Local Search Results
🔍	Search All Fields

☑ Search Well ☑ Search Site

Search All Fields

🔍 Show Advanced Search Tools

Total Objects: 1000 | Fetch More Results

Description	Actions
Makapuu 3-1939-003	Associate 🔗 Clone +
Waiono-Punaluu 3-3453-008	Associate 🔗 Clone +
Anahola 2-0919-003	Associate 🔗 Clone +
Feehan 2 6-5516-002	Associate 🔗 Clone +

Close

At the top of the form are search fields. In the lower half, there are existing metadata records that you can associate with your file by clicking "Associate" next to those that apply. When you are finished, click the "Close" button and you will see all the associated records appear in the data descriptor form.

Choose Location(s)

Makapuu 3-1939-003 ⊗   Luawai HinaHina 8-3688-034 ⊗

Kawailoa 3-3505-022 ⊗

The form will show a message that your data descriptor metadata has been saved and the new data descriptor will be shown as being associated with your file:

Associate These Files With Data Descriptors:

📄Public_Well_Index_02-05-15.xlsx

Data Descriptors associated with all the above files:

Description	Actions
General metadata for wells	🗑 Remove Association Clone ✚ ✏ Edit

If you need to change any of the values after this, click the "Edit" button next to your Data Descriptor. This will reload the form you just filled in, pre-loaded with all your values.

Data Descriptor
Associated Files:
📄/ikewai-working-sean//jgeis/Public_Well_Index_02-05-15.xlsx
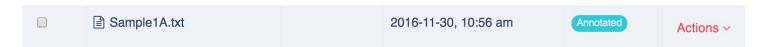
✏ Cancel Editing Without Saving

Edit Data Descriptor
Author(s):*⍰

Department of Land and Natural Resources, Commission On Water Resources Management ˣ

✚Add Author

Title:*⍰

General metadata for wells

License - Rights:*⍰

Creative Commons Attribution CC BY ▾

Access Rights: * ?

○ Private ● Public

Subject/Keywords/Search terms: ?

wells ×

Start Date: ?

2017-11-09 📅

End Date: ?

2017-11-06 📅

Format: ?

Select file format(s)...

Contributor - Person: ?

Select contributing people...

+Add Contributing People

Contributor - Agency: ?

Select contributing organizations...

+Add Contributing Organizations

Description: ?

Enter abstract or text describing this resource

Relations: ?

Enter filenames linked to this resource

Select Location(s)

Select Variable(s)

Close

Save Changes

After saving your metadata, if you go back to your "My Data" page and look in the "status" column, you will see the word "annotated" there.

| ☐ | 📄 Sample1A.txt | 2016-11-30, 10:56 am | Annotated | Actions ⌄ |
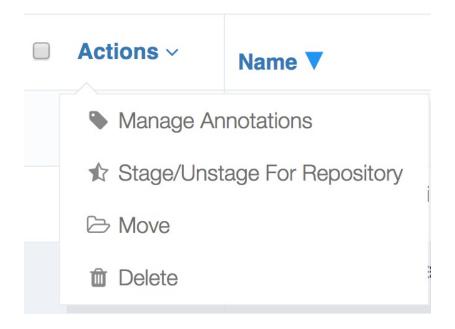
If you later decide other files should be associated with an existing data descriptor, select the "Manage Annotations" item from the Actions menu next to the file, then look through the Data Descriptors that are displayed at the bottom

of the resulting page. You can either make a copy of any of the data descriptors, or you can click the "Associate" button next to one or more data descriptors.

Once your files have sufficient metadata and you think it's ready for use by other members of the `IkeWai group, you will need to go through the "Staging" process to make that happen. This process lets the system administrators know that you have added the necessary metadata and ensured your file is ready for group use. The administrator will verify this and then publish your file to the repository. To stage multiple files with one action, all files all need to be in the same directory. Whether you want to stage a single file or multiple files, the process is the same.

First, go to the My Data page and check the box on the left side next to each file you want to stage. At the top of the files section of the page, click on the "Actions" menu.

Click the "Stage/Unstage For Repository" menu item. When the page refreshes, all affected files should now show as "staged" in the status column.

Should you later change your mind and decide the file is not ready for staging, follow the exact same process to reverse the status and unstage the file.

When each file is approved by the system administrator, the status will change to "published" and the file will now show up in the "Annotated Team Data" section of the site.

If you want to share your file with someone who is not in the `IkeWai group, you can generate a "Share Link" which will allow them to download the file without requiring any form of login. To do this, go to the "My Data" page. Click the "Actions" menu next to the file you want to share and select "Create Share Link." This modal will appear:

Create Share Link

Number of uses

> 1

Lifetime

> 30   ▾ days

> **Source:** https://agaveauth.its.hawaii.edu/files/v2/media/system/ikewai-
> working-sean//jgeis/Public_Well_Index_02-05-15.xlsx

Close   Create

The modal allows you to set the number of times the file can be downloaded and also lets you set an expiration date. Once you set those, click the "Save" button and the window changes to:

Create Share Link ✕

Number of uses

1

Lifetime

30   ▼ days

Source: https://agaveauth.its.hawaii.edu/files/v2/media/system/ikewai-working-sean//jgeis/Public_Well_Index_02-05-15.xlsx

Success! Here's the link, please email or copy it for future use: https://agaveauth.its.hawaii.edu/postits/v2/ea556e3ceb84b46c5fbc98124fb0e2 47

Close   ✉ Email   📋 Copy to clipboard   **Create another link**
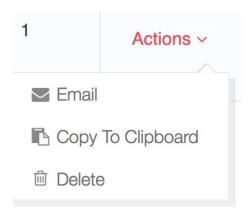
You can use the buttons at the bottom to either email it to someone, or copy it to your clip board for however you want to use it.

To see all your share links, click on the "Share Links" tab in the sidebar.

Manage your Share Links

☐	File ▲	Link	Expires	Uses Left	Actions
☐	/jgeis/Public_Well_Index_02-05-15.xlsx	https://agaveauth.its.hawaii.edu/postits/v2/ea556e3ceb84b46c5fbc98124fb0e247	12/06/17, 2:21 pm	1	Actions ⌄

All currently active share links will be listed here. You can use the items in the "Actions" menu next to each share link to email, copy, or delete each share link.
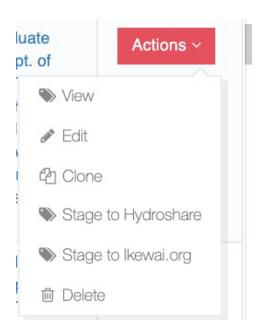
The Gateway also has the ability to push your files and associated data descriptor to Hydroshare or the Ikewai.org site. Ikewai.org is the public dissemination platform for all project created data. It is entirely up to the researcher as to when their data will be displayed there. However, note that if the researcher pushes their data to Hydroshare, it will also automatically be pushed to the ikewai.org site. Note that the ability to push to ikewai.org or Hydroshare is not available until after the files have been in the Gateway's annotated repository. The menu items discussed here will not appear until then.

To push to Ikewai.org or Hydroshare, go to your Data Descriptors page by clicking on the "Data Descriptors" menu item on the left side of the screen. This displays two sub-menu items "All Data Descriptors" and "My Data Descriptors." Click on the "My Data Descriptors" menu item. This loads a page that shows all data descriptors created by you.

Manage My Data Descriptors

Total number of your Data Descriptors: 23   ✚ Create New Data Descriptor

Title	Push Status	Summary	Actions
Kira and Sugar Glider	Pushed to Annotated Repository Staged to Hydroshare Staged to Ikewai.org	This is purely for testing the process of moving files and metadata for Hydroshare.	Actions ⌄
Some test Data Descriptor			Actions ⌄
Conference paper for Gateways 2019		Gateways 2019 conference paper submission discussing the `Ike Wai Gateway.	Actions ⌄
IkeWai marine Geophysics - raw CSEM data, Survey towlines time windows, and power spectrograms images	Pushed to Annotated Repository Staged to Hydroshare Staged to Ikewai.org Pushed to Hydroshare	IkeWai marine Geophysics, 3 files: 1.) CSEM raw data recordings (binary files), as acquired during 8 days of the marine CSEM survey conducted	Actions ⌄

Next to each data descriptor is an "Action" menu. Clicking on it shows:

If you were to click on the "Stage to Ikewai" menu, a modified version of the "View Data Descriptor" page appears. This page shows all the information on the data descriptor, along with the files associated with that data descriptor. It also has a button, "Stage to Ikewai" along with some explanatory text about what this means.

When that button is clicked, it notifies the Gateway administrators that you are ready to have your data appear on the ikewai.org site. The administrator will confirm the action and push the data descriptor and all associated files to the ikewai.org site where it will then be available to anyone, no log in required. Until the administrators do the push, you will see a new tag next to your relevant files that now says "Staged to ikewai.org." After the administrators do the push, the tag will change to "Pushed to ikewai.org."

If instead, you clicked the "Stage to Hydroshare" button, the same page that shows the data descriptor and file information will appear, but this time the button will say "Stage to Hydroshare." Before clicking this button, make sure to review your data descriptor to verify that everything is as you want it, particularly the license that you have selected. Once your data is pushed to Hydroshare and a DOI is obtained, the information cannot be changed.

Note that there is a secondary effect of the stage to Hydroshare, each of the associated files will be given a public URL which will enable those who do not have access to the gateway to retrieve the files. If you were to click on your

pushed Data Descriptor after having pushed it, you will see new URLs for each file at the top, labelled "Public File Links."

Data Descriptor

Associated Files:
/mydata-jgeis//jgeis/KiraAndSugarGlider.jpg
/ikewai-annotated-data//new_data/KiraAndSugarGlider.jpg [⬇ Download]

Public File Links:
https://ikeauth.its.hawaii.edu/files/v2/download/public/system/ikewai-annotated-data/new_data/KiraAndSugarGlider.jpg

Hydroshare Resource URL: https://www.hydroshare.org/resource/c4dc5c28e0604f4680e96bf0006c1e26

Upon clicking the "Stage to Hydroshare" button, Gateway administrators are notified and will review the submission and do the actual push to Hydroshare. Once that is done, the "Staged to Hydroshare" tag next to your relevant files will change to "Pushed to Hydroshare." Also, one more new URL will be added to the top of your data descriptor, the "Hydroshare Resource URL." This is a unique link to your resource at Hydroshare.

Unfortunately, Hydroshare does not allow the obtaining of DOIs through their API, so the Gateway administrators need to log in to the Hydroshare site and request the DOI manually. Once it is issued, the Gateway will be updated and the new DOI url will also be added to the Data Descriptor. In the meantime, the Hydroshare resource URL mentioned above can be used to see what your DOI link will be, should you need it for a publication.