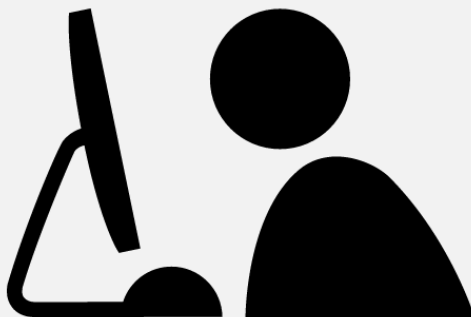




**DATA.GOV.UK** Beta  
Opening up Government



# USER GUIDE

*Administrators and Editors*

Version 3.5



# Account types

Welcome, this guide will help you through the process of using Data.gov.uk as an administrator or an editor and using the account tools to maximize your experience of the site.

The first step is to understand the different types of account and what they are for.



# Administrators

The administrator account serves to manage all editors creating/editing metadata under a given parent department. Administrators can create editors within their publisher hierarchy or across the family of publishers. Administrators are:

- The people that will approve your editor rights request
- First point of contact for FOI request (unless otherwise specified by the publisher)
- Create editors and other administrators
- Moderators of the activity of editors across its hierarchy



# Editors

Editors are the people in charge of creating metadata records for their organisations in Data.gov.uk. They have the ability to create and edit metadata for their assigned organisation. Editors are also responsible for regularly checking the comments on their datasets to capture ideas, clarify questions users of the data may have or discover, via feedback on the page, issues with the quality of the data. Editors:

- Create and edit metadata records for their organisation
- Take implied responsibility for keeping up to date with questions and issues with their records raised in the comments section of the metadata record page

# Getting an account

1- Click on the user icon on the top right of the screen



2- choose the 'I want to create an account' tab

3- Login into your new account, clicking on the user icon again should show a drop down menu with a link to your profile and a logout option

# Getting an account

- 1- Your profile will provide you with different options depending on your permissions.
- 2- If you are an editor/administrator, you will see new options under the data section

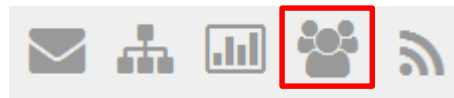


- 3- A new blue 'lock' icon appears next to the user icon, this is where you can quickly access your publishers or manage harvesting (only for those allowed)

# Become an editor

In order to create or edit datasets you will have to request editor rights from an administrator, follow these steps:

- 1- Log in and click on the data tab in the menu bar of data.gov.uk and select the publishers option from the submenu
- 2- Find the name of the publisher for which you need editor permissions and go to its main page by clicking it
- 3- Click on the administrators icon on the icon bar on the top right of the page



- 4- Select 'request to become an editor' and fill out the form, you should be notified by the publisher when you have been given publisher rights

# Become an editor

If your organization is not yet in the list of publishers, then you should request that it is added, by using the Contact us link at the bottom of the page. In the same request, provide your username and you can be added as an admin as well in one go





# PUBLISHER TOOLS

*Managing your account*

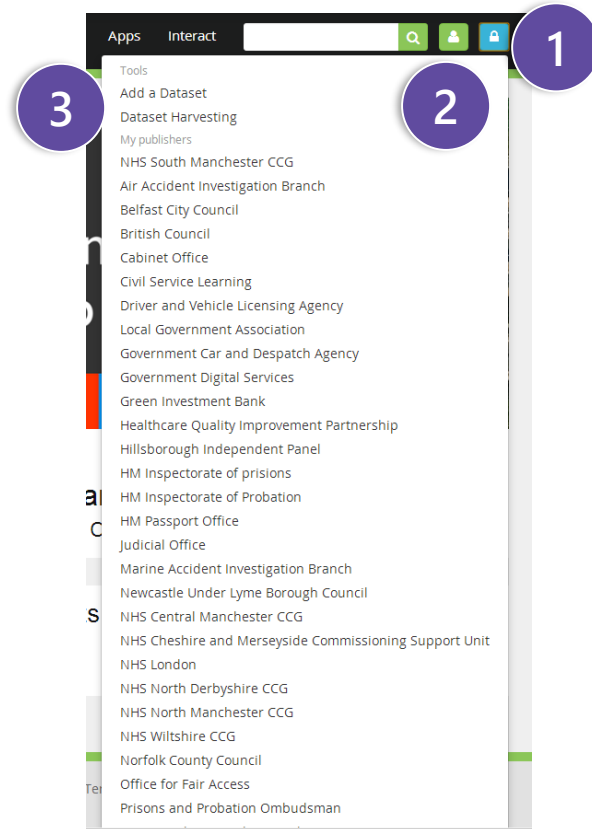


This section assumes  
that you have logged in  
to [data.gov.uk](https://data.gov.uk)

# Administrator Tools

The lock icon – your publishers

- 1** The 'lock' icon allows you to see and go to any of the publishers you have rights for
- 2** The 'user' icon allows you to see your profile or log out
- 3** You can add a dataset directly from the menu or go to the harvesting page



# Administrator Tools

The information icon bar and the administrator toolbox

**1** This row of icons gives you basic tools, detailed below

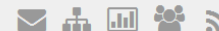
**2** The administrators box gives you access to the key operations you need to perform. 'edit user permissions' is only available to administrator accounts

## Cabinet Office (CO)

**Category:** UK Government Core Department

The Cabinet Office supports the Prime Minister and Deputy Prime Minister, and ensure the effective running of government. We are also the corporate headquarters for government, in partnership with HM Treasury, and we take the lead in certain critical policy areas. CO is a ministerial department, supported by 18 agencies and public bodies

You can find out more at <https://www.gov.uk/government/organisations/cabinet-office>



### Administrator Tools

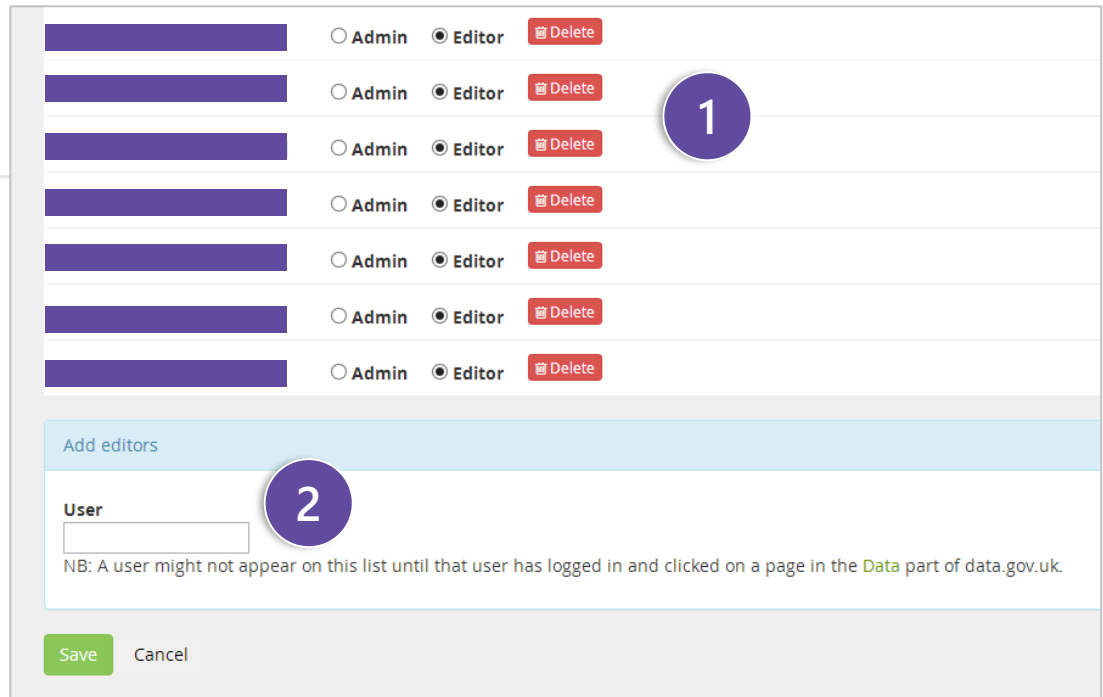
- ✎ Edit publisher properties »
- 📁 Manage unpublished datasets »
- ➕ Add a new dataset »
- 🔒 Edit user permissions »










# Administrator Tools

## Editing user permissions (administrators only)

- 1 Here you can manage which users have what rights regarding your publishing entity
- 2 Here you can add new users, there is an autocomplete function, just start typing the username you wish to add and then click save, A list of suggested users will appear for you. When you come back to this screen the user will be added and you can change their permissions



The screenshot displays the 'Administrator Tools' interface. At the top, there is a table with seven rows, each representing a user. Each row contains a purple rectangular placeholder for a user profile picture, followed by two radio buttons for permissions: 'Admin' (unselected) and 'Editor' (selected). To the right of the radio buttons is a red 'Delete' button with a trash icon. A purple circle with the number '1' is positioned to the right of the second row. Below the table is a light blue section titled 'Add editors'. Inside this section, there is a label 'User' above a text input field. A purple circle with the number '2' is positioned to the right of the input field. Below the input field, a note reads: 'NB: A user might not appear on this list until that user has logged in and clicked on a page in the [Data](#) part of data.gov.uk.' At the bottom of the 'Add editors' section, there are two buttons: a green 'Save' button and a grey 'Cancel' button.

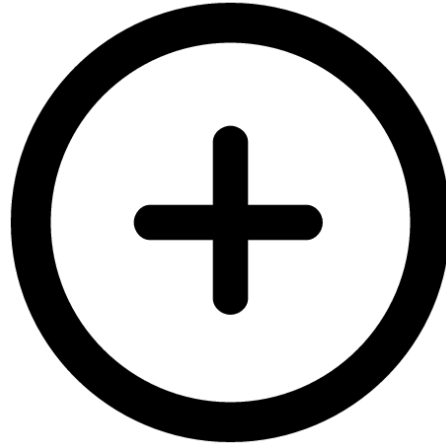
	<input type="radio"/> Admin <input checked="" type="radio"/> Editor	<a href="#">Delete</a>
	<input type="radio"/> Admin <input checked="" type="radio"/> Editor	<a href="#">Delete</a>
	<input type="radio"/> Admin <input checked="" type="radio"/> Editor	<a href="#">Delete</a>
	<input type="radio"/> Admin <input checked="" type="radio"/> Editor	<a href="#">Delete</a>
	<input type="radio"/> Admin <input checked="" type="radio"/> Editor	<a href="#">Delete</a>
	<input type="radio"/> Admin <input checked="" type="radio"/> Editor	<a href="#">Delete</a>
	<input type="radio"/> Admin <input checked="" type="radio"/> Editor	<a href="#">Delete</a>

Add editors

User

NB: A user might not appear on this list until that user has logged in and clicked on a page in the [Data](#) part of data.gov.uk.

[Save](#) [Cancel](#)



**ADD OR EDIT A DATASET**

# Add a dataset

## Adding Location (INSPIRE) data

Location data (which comes under the INSPIRE legislation) has a different mechanism for publication, it must be 'harvested' into [data.gov.uk](https://data.gov.uk).

For more information, see "UK Location Discovery Metadata Service Operational Guide" on the Library section, under the 'Interact' main menu

[http://data.gov.uk/sites/default/files/DMS%20Operational%20Guide%202-2\\_10.pdf](http://data.gov.uk/sites/default/files/DMS%20Operational%20Guide%202-2_10.pdf)

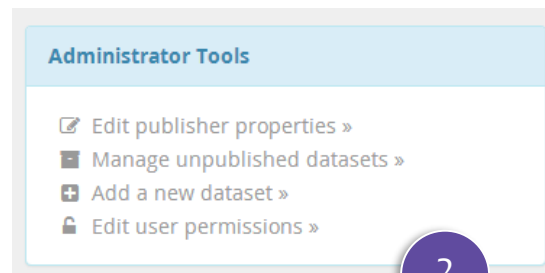
# Add a dataset

Two options to start publishing

- 1 Click on the 'lock' icon and choose add a dataset



- 2 Or click on 'add a dataset' on the administrator toolbox on the main page of the publisher you wish to publish for (this will automatically select it as the publishing department)





# Add a dataset

Publication wizard

1

The publication/editing wizard follows a tab structure. When creating new datasets you will have to click on next at the bottom of the wizard to continue.

## Dataset Editor

Name

Data Files

Description

Licence

Publisher

Theme & tags

Additional resources

Temporal coverage

Geographic coverage

Extras

State

1

# Add a dataset

Name


**1** Think of a logical name for your record if you are creating a new one. Check the 'metadata guide' in the library for more info

**2** This is where the dataset will be located in DGUK once created, you don't need to do anything with it

## Name


Please name your data record.

**Name:**

Central Government P 

1

**Unique identifier for this data record:**

/dataset/epims 

2

# Timeseries vs Single File

It is very important that you select the right type of dataset. If you are publishing a dataset that will have updates across time (yearly, monthly, etc.) then make sure you select the timeseries option on the data files section. This will allow the date of the file to dictate the sorting, so the latest file is automatically presented on top and everything else falls in chronological order.

If you choose single file and then add subsequent publications, you will have to order them manually, you should not select single file for datasets that will have new files across time.

# Add a dataset

## Data files

- 1 Choose whether you are creating a single file record (a record for a one off file) or a time series, for a single file...
- 2 Give the file a comprehensive title. Be succinct (i.e. Bird population in Essex by type)
- 3 Provide the link to the file, not to an html page, but to the file directly. Format will be added automatically
- 4 You can then check if the address is correct by using the 'check url' button or check all after you have finished adding the links
- 5 You can add more files (some returns, even if they are single may contain more than one file) by clicking the plus sign

### Data Files

In this tab you enter the links to the files containing the actual data at the heart of this record.

Your record may be creating a single file record (a record which points to just one file) or you may be creating a timeseries record (where multiple files are released over time, for example the £25k spend data, where a new data file is added to the record monthly).

This record is:

☒ **A single file record**

☐ **A timeseries record**

If your data comes in multiple formats, use a line for each.

**NB: Do not put links to web pages here.** These and other useful documents that are not actually the data should go in the 'Additional Resources' section.

	File Title: ⓘ	URL: ⓘ		Format: ⓘ	
↑	Unclaimed Estates (Ne	http://www.bonavacar	Check	CSV	
↓			Check		+

Check all URLs

# Add a dataset

## Time series

- 1 A time series record is for files that will have newer iterations as time passes (expenditure, cyclical data, etc.)
- 2 Give the file a comprehensive title, be succinct (i.e. Bird population in Essex by type)
- 3 Provide the link to the file, not to an html page, but to the file directly. Format will be added automatically
- 4 You can then check if the address is correct by using the 'check url' button or check all after you have finished adding the links
- 5 Provide the date of the file, not the date you are uploading, follow the format suggested

### Data Files

In this tab you enter the links to the files containing the actual data at the heart of this record.

Your record may be creating a single file record (a record which points to just one file) or you may be creating a timeseries record (where multiple files are released over time, for example the £25k spend data, where a new data file is added to the record monthly).

This record is:

☐ A single file record

☒ A timeseries record

If your data comes in multiple formats, use a line for each.

**NB: Do not put links to web pages here.** These and other useful documents that are not actually the data should go in the 'Additional resources' section.

monthly  Update frequency ⓘ Other:

	Date: ⓘ	File Title: ⓘ	URL: ⓘ	Format: ⓘ
↑ ↓	May 2010 - March 2011	May 2010 - March 2011	https://www.gov.uk/go Check	CSV
↑ ↓	April - August 2011	April 2011 - August 2011	https://www.gov.uk/go Check	CSV

# 'Check' functionality

The 'check' functionality allows the system to identify the format of the file and automatically add it to the record, avoiding chances of different spellings. The 'check all URLs' option allows you to check that the URLs entered are all active and working.

If you encounter problems when clicking the 'check' or 'check all URLs' buttons (no format appears in the format box or the check all URLs process takes too long ) don't use them. Manually enter the format of your file (which SHOULD always be CSV or another open format, NOT XLS, HTML OR PDF). This issue arises because some older browsers like IE7/IE8 may not work well with this feature.

# Add a dataset

## Description

1

Provide as much information about the file as you can, remember that the first few lines of this description will appear in search results

### Description

Please add a description of the data set. What does the data contain/show? Why was it produced?

(It is often displayed with the package title. In particular, it should start with a short sentence that describes the data set succinctly, because the first few words alone may be used in some views of the data sets. Here is the place to state if there are any limitations or deficiencies to the data in order to enable users to evaluate the information; even incomplete data may be adequate for some users).

A list of all Government Procurement Card financial transactions spending over £500 made by the Foreign and Commonwealth Office, as part of the Government's commitment to transparency in expenditure.

1

# Add a dataset

License

1

Leave as default unless the dataset is bound by a different licensing scheme (it should not as a rule). If other is chosen in the drop down you will be able to add details for the license

## Licence

1

### Licence:

UK Open Government Licence (OGL)



The licence under which the dataset is released. For most situations of central Departments' and Local Authority data, this should be the 'Open Government Licence'. If you wish to release the data under a different licence, please select "Specify other" and enter the name of the licence in the "Licence (other)" box provided.



# Add a dataset

Publisher

1

This information is provided from our records. If the details are wrong you can modify them

**Publisher**  
Published by:

**Contact details**  
Here are the contact details that will be displayed for this dataset. The default Contact and FOI information is taken from the selected publisher, but you may edit it for this dataset.

**Publisher Contact Details**  
Name:   
Email:   
Phone:

**FOI Request Contact Details**  
Name:   
Email:   
Phone:

# Add a dataset

## Theme & Tags

- 1 Select a primary theme from the drop down. These are top level tags that place the record within a specific 'area'
- 2 Choose a secondary granularity for the theme
- 3 Provide your own tags for the file. See the TAGS section in this guide for a primer on creating tags

### Primary Theme 1

1. Please choose a primary theme which this data record falls under from the options below. See the [themes page](#) for more information.

- ☐ Business & Economy
- ☐ Crime & Justice
- ☐ Defence
- ☐ Education
- ☒ Geography
- ☐ Government
- ☐ Government Spending
- ☐ Health
- ☐ Society
- ☐ Transport

### Secondary Theme 2

2. If there are other themes which this data, select them here:

☐ Business & Economy  
☐ Crime & Justice  
☐ Defence  
☐ Education  
☐ Geography  
☒ Government  
☐ Government Spending  
☐ Health  
☐ Society  
☐ Transport

### Tags

3. Please provide additional tags for this data record to help users find and browse between related data records. Just type and click enter to add more tags:

Tags

Government, Location, address, building, central-government, d

# Add a dataset Additional

- 1 Here you can enter links to any other document or page that provides more information on the data

### Additional resources

You can add links to additional resources here. Use a link for each resource. This could be PDFs of files explaining the data or links to a website with more information.

Description:	Link: ⓘ	Format: ⓘ	
<input type="text"/>	<input type="text"/> <span>1</span>	<input type="text"/>	<input type="button" value="Check"/> <input data-bbox="1599 825 1624 843" type="button" value="+"/>

Mandate

An Internet link to the enabling legislation that serves as the mandate for the collection or creation of this data, if appropriate.  
For example *Public Record Act s.2* would be:  
<http://www.legislation.gov.uk/id/ukpga/Eliz2/6-7/51/section/2>  
This should be taken from The National Archives' Legislation website, and where possible be a link directly to the relevant section of the Act.

# Add a dataset

Temporal

- 1 If the data covers a range of dates (i.e. all sales from 2010 to 2012) provide them here, FOLLOW THE DATE FORMAT SPECIFIED

**Time & date**

Temporal coverage  -

*e.g. 21/03/2007 - 03/10/2009 or 07:45 31/03/2006*

If available, please indicate the time as well as the date. Where data covers only a single day, the second box can be left blank.

# Add a dataset

Geographic coverage

**1** Give us an idea of the geographical coverage of the data

## Geographic coverage

1

- ☒ England
- ☐ Scotland
- ☐ Wales
- ☐ Northern Ireland
- ☐ Overseas
- ☐ Global

Where a dataset covers multiple areas, the system will automatically group these (e.g. 'England', 'Scotland' and 'Wales' all being selected would be shown as 'Great Britain').

# Add a dataset

## Extras

**1** A link to yet more info on the data

**2** When was it released as a dataset?

**Extras**

URL

The Internet link to a web page discussing the dataset.  
e.g. <http://www.somedept.gov.uk/growth-figures.html>

Date released

Format: DD/MM/YYYY  
This is probably not the date that it is uploaded to data.gov.uk. Be careful not to confuse a new 'version' of some data with a new dataset covering another time period or geographic area.



# Add a dataset

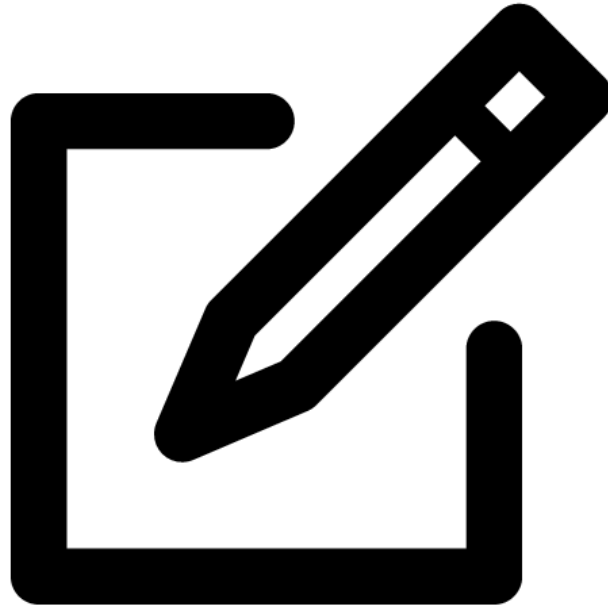
Save & Finish

- 1 You can now save and finish the creation/editing process

1

Save and Finish

**Important:** By submitting content, you agree to release your contributions under the [terms & conditions](#) of the site. Please **refrain** from editing this page if you are **not** happy to do this.



**EDITING**

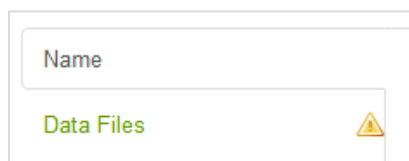


# Editing a record

## Errors

Editing a record uses the same simple metadata screen as in adding a dataset. A couple of things to have in mind:

1. We have introduced a theme structure to the tags, as you are editing an existing record, it may not have a theme selected, before you save, you must go to the themes section and add them.
2. If something is missing, after clicking save and finish, you will still be presented with the edit screen and a yellow triangle will appear next to the section that needs attention, the system will also tell you what the problem is at the top of the screen above the name tab.



# 'Check' functionality

The 'check' functionality allows the system to identify the format of the file and automatically add it to the record, avoiding chances of different spellings. The 'check all URLs' option allows you to check that the URLs entered are all active and working.

If you encounter problems when clicking the 'check' or 'check all URLs' buttons (no format appears in the format box or the check all URLs process takes too long ) don't use them. Manually enter the format of your file (which SHOULD always be CSV or another open format, NOT XLS, HTML OR PDF). This issue arises because some older browsers like IE7/IE8 may not work well with this feature.

# Editing a record

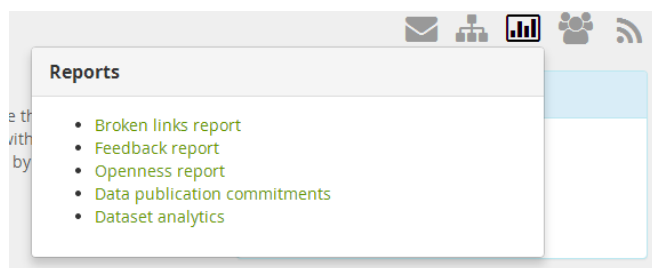
Errors

You know everything went ok when you click 'save and finish' and you are taken to the record view screen (the dataset). **If**, after clicking 'save and finish', you are still in the editing screen then:

YOUR CHANGES HAVE NOT BEEN SAVED!

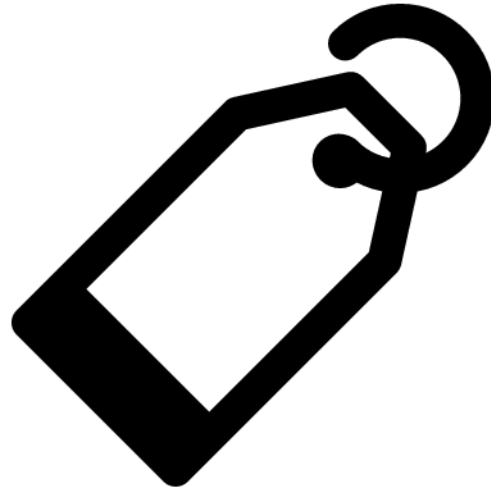
# Reports

Data.gov.uk provides a series of reports to help you to manage your publications. They are department-related reports, available from departmental pages.



Currently we provide:

- **Broken links report**— listing all resources with broken links for a given publisher
- **Feedback report**— the number and feedback on the 5 criteria voting for all datasets
- **Openness report**— Listing the different 5 star ratings for each dataset for a given publisher
- **Data Publication commitments**- A list of all the public commitments made by the publisher and links to those already completed
- **Dataset analytics**- Listing analytics on usage and popularity for datasets and publisher



**TAGS**

# Tags

Tags are one of the most important aspects of record creation. Proper and efficient tagging means your data will be accurately matched against search criteria.

Let's say we have a record and it is called:

*Accident and Fatalities across southeast London 2006-2011*

The record has a listing of accidents, against the roads on which they happened, type of vehicle involved (just generic type like sedan, lorry, motorcycle, no model) Weather conditions at the time and a column with number of fatalities if any. Let's say the file is a report produced every five years and it is known in the vernacular as AFSL.

There is no need to include the title as a tag, a logical set of tags could be:

*Roads fatalities highways London southeast*

Notice that tags are separated by spaces and tags with compound words have their internal spacing identified by a dash, roads is self-explanatory, so is highways and London and southeast, fatalities is in the title but it does not hurt to include it as it is a very specific key term regarding what the file deals with.

Thematically the logical choices would be:

*Transport*

Secondary tags we could choose:

*Health or Society*

We could then look at any other level of granularity we could include. If the file is compiled primarily by the AA on behalf of the publisher, even if the file does not mention that in its content, it is worth adding AA as a tag. This is an example of where the knowledge of the publisher can provide further accuracy. We could choose to add the terms lorry, sedan and motorcycle as tags, this will give further granularity as the search engine does not know what's inside the file and someone may be looking for data on motorcycles, any data.

# Spelling and repetition

When you start entering your tags, one thing to have in mind is the spelling of your key terms. Stay in the singular unless it makes absolute sense to use plural (like fatalities above), so you would avoid motorcycles lorries sedans and stick with motorcycle lorry sedan. The search engine autosuggests as soon as you start typing so users will be able to see what spelling has been used across the catalogue, hence if we all stay with motorcycle, the chances are that as the user starts typing moto..., they will see one tag and only one tag; motorcycle

Ignore capitals in tags, stick to lower case no matter what.



Don't rely on tags  
alone, enter proper  
metadata



# Example, a file called

## Protected birds and their numbers in the midlands

This file is annual, contains number of birds, species classification, location by ward and entity in charge of protecting it

First, we would tag this as bird, not birds, we would probably also choose midlands (no caps) and species . We would ignore entities because there are too many to mention and the file is not about those entities but about the birds. We ignore ward because you would have added that on the geographical details on the metadata. We ignore location because by including ward you have set location. We would also ignore annual because we would have created a timeseries for this file and choose annual. Of course, we would also ignore numbers!

Our search will include items on the metadata record besides tags to zoom into the right results. Attempting to improve accuracy by tags is not only kind of lazy; it also leads to incomplete records. Filling in the metadata properly also saves you time. The success of data.gov.uk is heavily linked to your care when filling in metadata.



**GLOSSARY**

# Glossary

**Administrator:** A person in charge of managing all editor accounts and corporate details for a parent department or an entity

**API:** (Application Programming Interface) is a set of specifications used by software to talk to each other, in the case of Data.gov.uk, a set of 'commands' that applications can use to directly query the catalogue

**Dataset:** A dataset is a collection of data. It can contain a single file, several related files or several versions of the same item, such as a dataset for monthly expenditure data.

**Editor:** In data.gov.uk, an editor is a person with publishing rights for an entity or parent department. Editors can create new datasets or amend existing ones within those of the organisation they have rights for.

**Entity:** An entity is a generic term in data.gov.uk to refer to a publisher. An entity could be a parent department, one of the bodies under a parent department's hierarchy or a combination of both, hence entity allows us to encompass any of those possibilities.

**Harvesting:** This is the process by which a series of web services and information is 'crawled' (or scanned if you wish) to capture its information, it is mainly used in our map viewing implementation to update dataset records.

**JSON:** (JavaScript Object Notation) Is a text-based open standard used for the interchange of data in a human readable form.

**Parent Department:** A term referring to central departments in the UK government or to an entity to which the publisher has a direct reporting link (or the immediate reporting institution above the publisher)

# Glossary

**Publisher:** A publisher is an entity that publishes datasets in Data.gov.uk under its own identity, such as Department for Transport, Natural England, the Audit Commission or the Judicial Appointments Commission.

**Record:** A record is another name for a dataset, sometimes an easier term to understand when trying to explain the dataset structure in Data.gov.uk.

**Resources:** Resources are the files that comprise a dataset, generally these are links to the data file itself.

**Single file record:** This is a record/dataset that is a one-off record. It may contain several supporting files, but its nature is fixed in time, it does not get new data added in the future and its core data files do not get updated with a newer version, although links to information files included could be updated if newer, better versions that provide better context are available.

**Tag:** A tag is a keyword that allows the record to be associated with a specific concept.

**Theme:** A theme is an overarching tag referring to key sectors (i.e. health, transport) that allows the catalogue to create top level indexes of data related to these sectors, in Data.gov.uk they are pre-set and cannot be modified by Editors or Administrators.

**Timeseries record:** A time series record is a record/dataset for data that gets updated periodically, be it monthly, quarterly or annually.

**URI:** (Uniform Resource Identifier) is a string of characters used to identify a resource, in Data.gov.uk they identify a dataset (record).



**FaQ**

# FaQ

## If I make a mistake, can I delete a dataset?

You can always go back and edit a dataset but you cannot delete it. If there is a need to delete a dataset you need to contact your administrator or the Data.gov.uk team (from the contact us link in the site)

## Should I delete previous versions of a data file when a new version becomes available?

No, we keep historical versions once published, if the dataset is for a single file and a new version of that file is available, simply add it to the record if the data belongs to a time series simply add it.

## Our website has a lovely portal where we publish our data, can I just point to it?

You **must** provide a link to the data file itself, you can always add a link to your portal under the URL option in the extras section of the publishing wizard.

## How do I determine what data should be published in Data.gov.uk?

Any data file that is made public by your entity should have a dataset record in Data.gov.uk, the aim is to make as much data available as possible.