

DReSA User Manual

Version 1.3.5



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1. About DReSA

DReSA began as a grassroots movement among trainers and training providers in Australia and New Zealand to improve the discoverability of digital skills training. It was an outcome of the [ARDC's Australian eResearch and Data Skills Summit 2020](#) that led to the establishment of the *National Training Registry and Calendar Working Group*. And, after scoping the landscape for appropriate solutions, the *Working Group* found the ELIXIR TeSS platform, which provides the code base from which DReSA was built. From there a truly collaborative, global partnership with ELIXIR began, with an exchange of both the infrastructure that underlies TeSS, and ideas, support and encouragement.

DReSA seeks to:

- Lift Australasian researchers' digital capabilities and skills by improving the findability of training events and resources.
- Build national, collaborative, training partnerships.
- Strategically leverage trainers' and learners' time and resources.
- make it easier for researchers, trainers, and training providers to find digital research skills-focused educational events and resources.

There is more information available on the following subjects by following the *About* link on the navigation bar:

- What is DReSA?
- How to register content (events, materials, and providers) in DReSA.
- Information for developers who want to connect their training systems to DReSA.
- How to contact the DReSA team, and who are the people and organisations that have worked to establish DReSA.

The remainder of this manual will describe the features of the DReSA web application, which is accessible at the following address: <https://www.dresa.org.au>

2. Application Layout

The layout of the home page is shown below. The main sections of the application are the header, footer, and the main content areas. See Figure 1.

The **header area** contains the following:

- The user bar: Server name and user log in button. Shows the user actions when logged in.
- The nav bar: DReSA home icon/link, and the navigation links to the index and *About* pages.
- The message bar: this is where general messages and announcements are displayed.

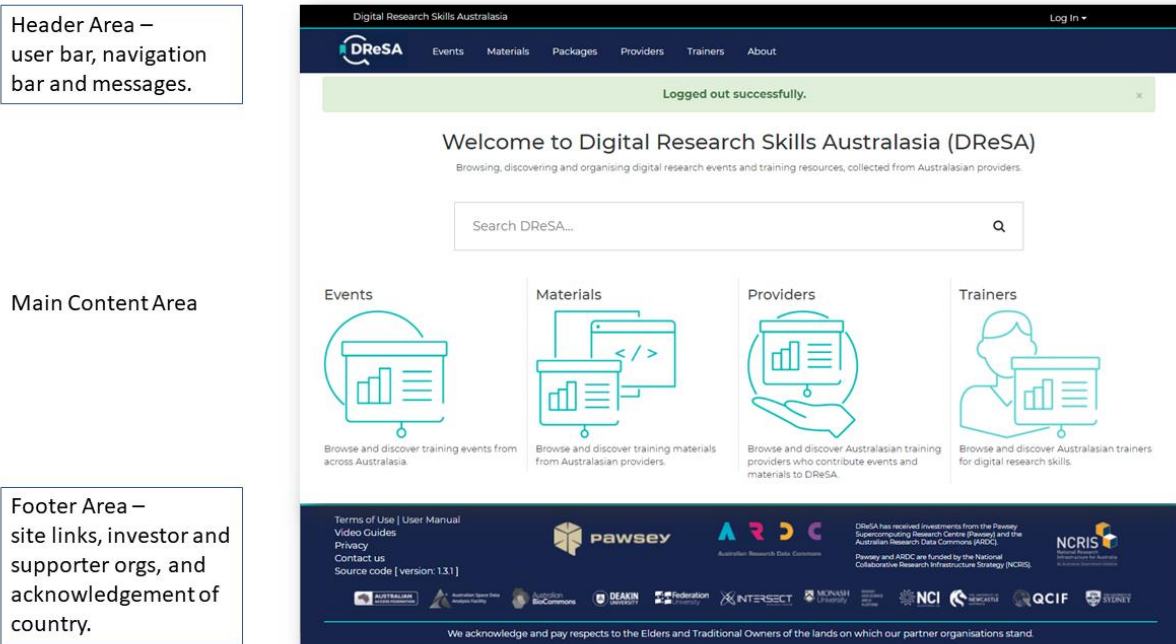


Figure 1 - layout of the application and home page.

The **footer area** contains the following:

- **Site links:** links to the User Manual, contact email address, further information about privacy, acknowledgement of the funding and supporters of DReSA, and a link to the source code on GitHub.
- **Organisations:** Information and links to the organisations that have invested in or supported the development of DReSA.
- **Our acknowledgement of country.**

The **content area** is where information about the resources can be created, maintained, and searched. These resources include training events, training materials, and content providers. In addition, information about trainers will be included as a resource in DReSA, as part of the next phase of development.

On the home page the content area contains a general search field, links to the resource index pages (these are the main starting point for searching, creating and maintaining resources) and a set of cards that summarise the resources that are the *Latest Content added to DReSA*.

3. User Access, Subscriptions and Starred Resources

Most information about resources in DReSA is publicly available, but a user profile is required to create and maintain resources. The process for creating a user profile is as simple as logging into DReSA by selecting one of the supported access federations from the drop-down list (see Figure 2) via the *Log In* link. DReSA currently support the Australian Access Federation (AAF) and the Tuakiri Access Federation, which together facilitate authentication via most Australian and New Zealand research institutions.

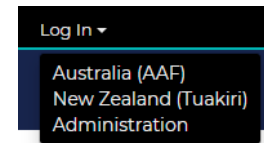


Figure 2 - Log In Drop-down

On first login, DReSA creates a new user profile for the user and the appropriate user action icons will be displayed in the user bar, see Figure 3

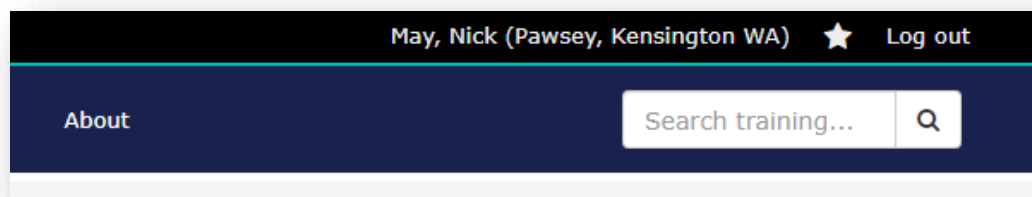


Figure 3 - An Example of the user actions for a registered user.

User actions:

- The user's name (and optionally the organization) is a link to the user's profile page.
- The star is a shortcut to the user's *Starred Resources* page.
- The last link closes the user's session.

The user's profile page allows the user to view their profile and provides links to resources that they have created. This page displays the following user information:

- **Account details:** role (default is *Registered User*), account email, and authentication token. These last two items are provided by the institution that the user used to log in.
- **User icon:** The image displayed is the Gravatar image associated with the account email. Gravatar provides a way to link an avatar with an email address so that it can be used across sites and platforms. This link can be set-up on the Gravatar site: <https://en.gravatar.com>
- **Public user** information: first name, surname, public email address, website URL, ORCID URL, and trainer registry status.

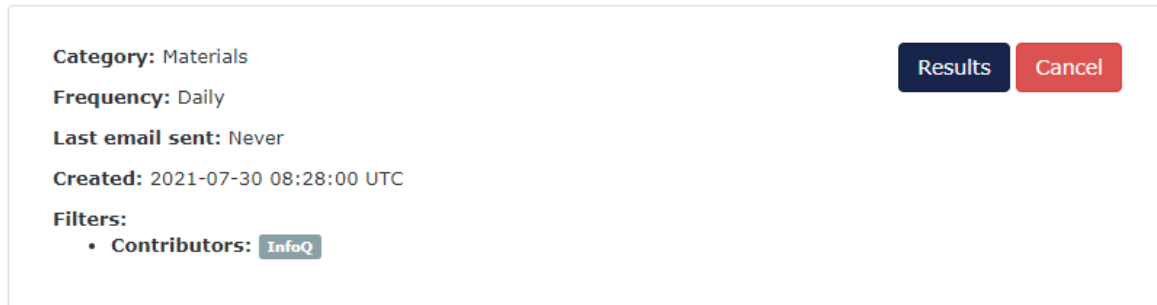
Starred Resources Page

This page is accessible from the *User bar* via the star icon (★) and shows summary cards for the resources that the user has starred.

The starred status of resources can be changed by using the *Star* and *Un-star* buttons that appears on the event and material detail pages.

Manage Subscriptions Page

This page is accessible from the User Profile page via the *Manage subscriptions* button. Each subscription card shows the details for a single subscription and provides buttons to view the current results and cancel the subscription. An example of a subscription card is shown in Figure 4.



Category: Materials

Frequency: Daily

Last email sent: Never

Created: 2021-07-30 08:28:00 UTC

Filters:

- Contributors: InfoQ

Results Cancel

Figure 4- An example subscription details card.

4. Edit Profile and Trainer Details

This page can be accessed from the User Profile page via the *Edit profile* button. The user profile fields, and the start of the trainer detail fields, are shown in Figure 5.

It allows a user to edit the public profile and add details about their training experience. In addition, the user can choose to publish these details to the Trainer Registry.

The User profile includes two URL fields, *Website* and *ORCID*, which are validated to ensure that they are in the correct format and accessible, if entered.

All profile fields are optional, except for the following fields, which are required when publishing to the Trainer Registry:

- *First name, Last name, and Summary.*

To publish to the *Trainer Registry*, the user must ensure that the box is checked at the bottom of the form before clicking the *Update profile* button. See Figure 6.

Edit profile



First name

Last name

Website

ORCID

Contact email address

The image displayed with your profile is the Gravatar image associated with the provided contact email address. Gravatar provides a way to link an avatar to an email address so that it can be used across sites and platforms. To set-up a linked avatar, go to the Gravatar site: <https://en.gravatar.com>

Trainer Details



Summary

Figure 5 - Start of the Edit Profile form.

By clicking the box below you are giving permission for us to share the information in your profile through a public search of registered trainers.

☒ Show in Registry of Trainers?

Update profile Cancel

Figure 6 - Publish to the registry checkbox.

5. Searching for Events, Materials and Providers

There are several ways to search for resources.

Search Field

The **general search field** is displayed in the content area on the home page and in the nav bar on every other page. This field performs a keyword search on all active resource titles, i.e.:

- a resource's title must contain all keywords, and
- events must be forthcoming.

Index Pages

Each resource type (events, materials, providers) has an index page that lists all active resources of that type. For instance, the events page shows cards for all events that have not yet been held. This list can be refined by selecting from a range of criteria from the menu of the left of the page. See example in Figure 7.

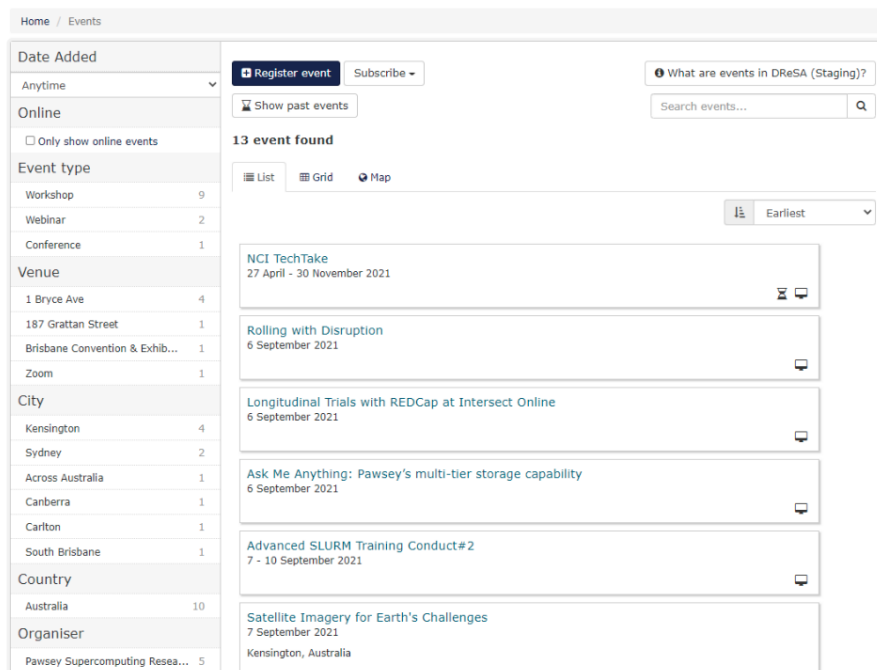


Figure 7 - An example content area of an events index page.

Each **index page** (events, materials, providers) also contains a general search field that is restricted to the specific resource type.

Subscribing to events and materials

Users can subscribe to searches, of events and materials, using the *Subscribe* button. This gives the option to *Subscribe by email* or, for events only, *Add to calendar*.

The *Subscribe by email* option will save and automatically re-run the current search and the user will receive an email of the results of new events or materials, including those that have been registered since the last run. Users will be prompted to select the re-run frequency from the following options: Daily, Weekly, Monthly.

The *Add to Calendar* option displays instructions on how to subscribe to all events using Google Calendar.

6. Creating and Maintaining a Provider

Content providers are entities (such as academics, institutions, non-profit organisations, portals, etc.) that provide training materials of relevance to digital research skills. Providers can be found using the content provider index page, which is accessible via the Main page or by using the *Providers* nav bar link. An example index page for content providers is shown in Figure 8.

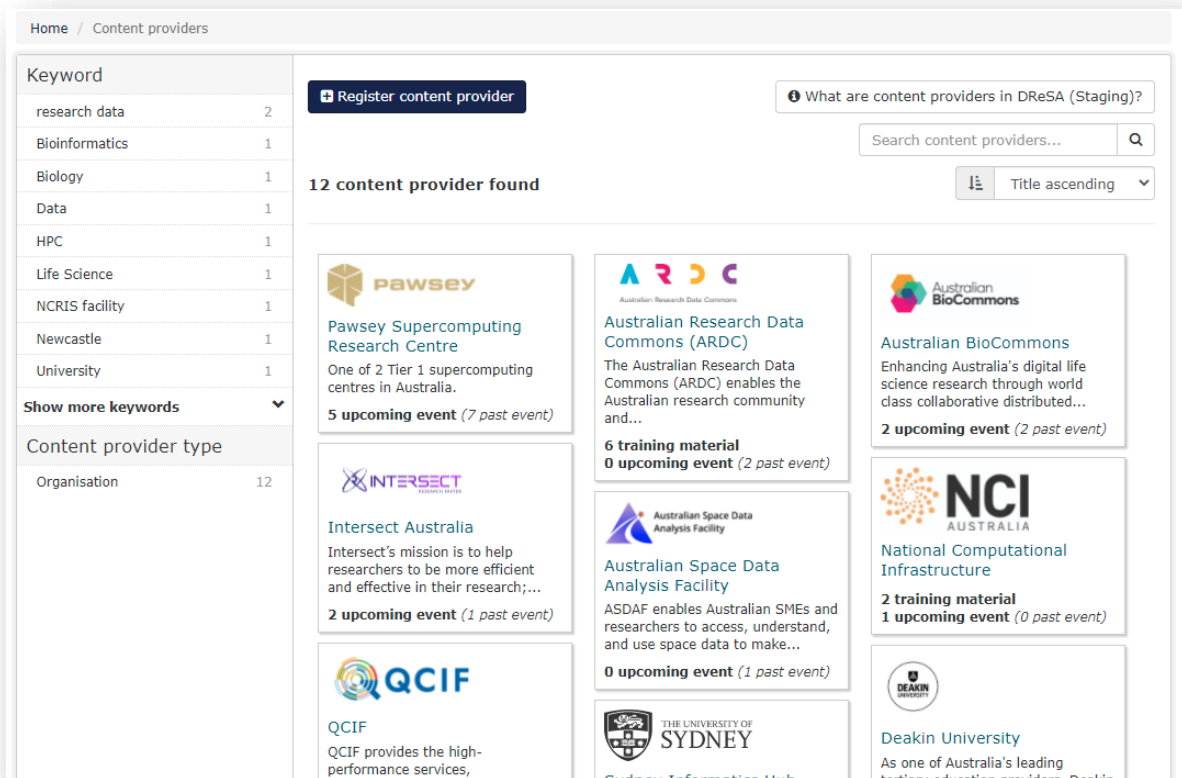


Figure 8 - An example of the providers index page.

Content providers can be found using the same search methods used for events and materials.

Creating a Provider

To create a new provider, click on the *Register content provider* button. This displays the new content provider page as shown in Figure 9.

Mandatory fields are as follows: Title, URL (which must be a valid and accessible location).

Optional fields are as follows: Description, Image, Type, Approved Editors, Keywords, Owner.

By default, the owner of a provider is the user that creates it, although an alternate owner can be assigned on creation of a provider.

Approved Editors

The owner of a content provider can select a list of users who are authorized to create and maintain resources associated with the provider. Removing a user from this list will reassign associated resources to the owner of the provider.

New content provider

* Title

* URL

Description

 This field supports markdown, click here for a reference on markdown syntax.

Image

No file chosen

or enter a URL:

Type

Organisation

Approved editors

Add Approved editors ▾

Keywords

+ Add keyword

Register content provider

Back

Cancel

Figure 9 - New provider page.

Maintaining a Provider

To view a provider, click on the card describing the provider on the index page. From this page, users with the appropriate access will be able to *Edit* or *Delete* the provider. Access to update or delete a provider is only available to the owner and administrator users.

The same requirements for mandatory and optional fields apply to the update of providers.

Note: deleting a provider will delete all events and materials that are linked to the provider.

7. Creating and Maintaining Events

An event in DReSA is a link to a single training event sourced by a provider along with a description and other information (such as: data, location, audience, ontological categorization, keywords, etc.). Training events can be added manually or automatically harvested from a provider's website.

Locking Fields

Much of the content in DReSA can be retrieved and kept up to date via automated scrapers that pull information from provider public web pages and APIs at regular intervals. For more information and examples. see [Tess scrapers](#).

To prevent DReSA from overwriting a field during automated updates, individual fields can be locked by clicking on the unlocked icon (see yellow icon below). This will change to the green locked icon.



Unlocked field icon



Locked field icon

Creating Events

To create a new event, click on the *Register event* button on the events index page.

Note: If the user is going to be creating many events or events that occur frequently, it is recommended that they create a *Provider* record, before creating any events, and use the *Content Provider* field to associate the events with the provider.

Event Types

The first field to note is the *Type* field. Events can be Face-to-face or Online. Use the selector to change the event type (see Figure 10). The type of event determines which fields are mandatory, since Face-to-face events must include some location data that is not required for online events.

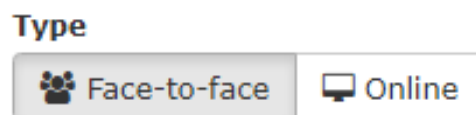


Figure 10 - Event type selector.

Mandatory and Optional Fields

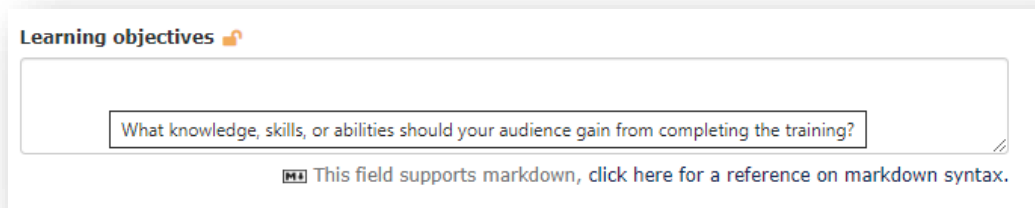
Mandatory fields: Title, URL, Organiser, Description, Host Institutions, Contact, Eligibility.

The following fields are **required** but will be filled with default values: Start, End, Timezone.

The following fields are **required** only for face-to-face events: City, Country.

Optional fields: Subtitle, Duration, Prerequisites, Learning Objectives, Keywords, Venue, Postcode, Target Audience, Scientific Topics, Capacity, Event Type, Tech Requirements, Fields of Research, Credit or Recognition of Attendance, External Resources, Cost, Cost Basis, Cost Currency, Content Provider, Associated Materials.

Further information about each field can be found by hovering the mouse over the field entry box. See Figure 11 for the hover text for the *Learning Objectives* field.



Learning objectives 📌

What knowledge, skills, or abilities should your audience gain from completing the training?


 This field supports markdown, [click here for a reference on markdown syntax](#).

Figure 11 - Hover text for the learning objectives field.

The Address Field

The location fields can be populated using the Address field, which is visible only for Face-to-face events. This provides a search function that links to Google Maps to find locations. The location fields will be populated, and a marker added to the map, by selecting an option from the drop-down list which appears as an address is entered. Note that selecting a location does not update the Time zone field.

Start and End fields

These fields specify the date and times that mark the start and end of the event. These can be selected using the calendar icon on the left or entered directly. To specify full day events, the start time must be 00:00 and the end time 23:59.

Viewing an Event

After an event has been created, it will be visible via the event index page. Clicking on the events card displays the event details page. At the top of this page are the following buttons:

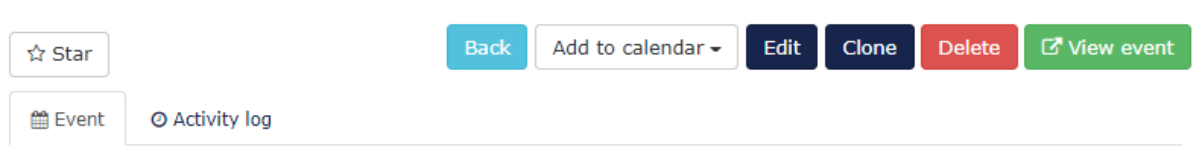
- **Star:** add this event to the user's *Starred Resources*.
- **Back:** go back to the index page.
- **View event:** go to the URL specified in the event's details. Opens in new tab.
- **Add to calendar:** export event details as either a Google Calendar entry or an iCalender (.ics) file

The same mandatory/optional fields apply when editing an existing event as when creating a new event.


Maintaining and Cloning an Event

Additional actions are available if the user is an owner of the event, including *Edit*, *Clone*, and *Delete*, see Figure 12. These buttons allow an owner to change event details or delete the event completely.

The *Clone* action duplicates the event fields, except the *URL*, and presents the user with a new event form. From there, the user can edit the details and insert a new event.



☆ Star

Back Add to calendar ▾ Edit Clone Delete  View event



 Event  Activity log

Figure 12 - Event actions available for 'owned' events.

8. Creating and Maintaining Materials

In DReSA, a training material is a link to a single online training material sourced by a content provider (such as text on a Web page, a presentation, video, etc.) along with description and other information (such as ontological categorization, keywords, etc.). Materials can be added manually or automatically harvested from a provider's website.

Materials resources can be *Viewed and Starred* by any user and *Edited or Deleted* by the owner.

To create a new material entry, click on the *Register training materials* button on the materials index page.

Mandatory, Recommended and Optional Fields

Mandatory fields: Title, Description, Keywords, URL (must be valid and accessible), Licence, Status, Contact.

Recommended fields: DOI, Version, Content Provider, Authors, Contributors, Associated Events, Target Audience, Prerequisites, Competency Level, Learning Objectives, Date Created.

Optional fields: Fields of Research, Date Modified, Date Published, Material Types, Other Types, Subsets, Syllabus, External Resources.

Material Types

This field allows the user to select one or more items from a set of defined options, including: Video Lecture, Tutorial, Presentation, etc. In addition, users can select 'Other' as an item and enter additional material types in the free text 'Other types' field below.

9. Creating and Maintaining Packages

Packages provide a way for users to collect training events and materials into a single resource from the full catalogue of resources available in DReSA.

To create a new package entry, click on the *Create Package* button on the package index page.

Mandatory and Optional Fields

Mandatory fields: Title.

Optional fields: Description, Image, Public, Keywords, Materials, Events.

Packages can only be *Viewed* by their owner unless the *Public* check box is selected.

10. Search Fields

Full Text Search

The general search bar (*Search DReSA...*) that appears on the home page and navigation bar will only search for the input text in a subset of fields, as detailed below:

Events:	Title, URL, Organizer, Venue, City, Country, Provider's title, Host institutions, and Time zone. Sort title: Title.
Materials:	Title, Description, Contact, DOI, Authors, Target audience, Keywords, Resource type, Contributors, and Provider's title. Sort title: Title.
Providers:	Title, Description, Keywords. Sort title: Title.
Trainers:	Full name, Summary, Location, Expertise (Academic and Technical), Interests, Activities, and Languages. Sort title: Full Name.

Search Filters

The fields that are available to filter searches on each index page are detailed below:

Events:	Date added, Online, Type, Venue, City, Country, Organiser, Target audience, Keywords, Fields of Research, Eligibility, and Provider.
Materials:	Date added, Keywords, Fields of Research, Licence, Target audience, Authors, Contributors, Type, Related resources, and Provider.
Providers:	Keywords, Type.
Trainers:	Location, Experience, Expertise (Academic and Technical), Fields of Research, Interests, Activities, and Languages.