

# InfraPortal User Guide

Version 1.3

# InfraPortal User Guide

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## Version History

Version	Date	Modified By	Change Log
1.0	06/03/20	JD / LT	Development of initial document
1.1	24/11/20	SB	Update to document post UI design improvements
1.2	01/12/20	SB	Reordering of sections to mirror InfraPortal website
1.3	08/12/20	SB	Updated screenshots

## Purpose

The purpose of this guide is to provide a walkthrough of the main activities that you will want to perform when navigating and uploading research and innovation infrastructures (RIIs) onto the InfraPortal website.

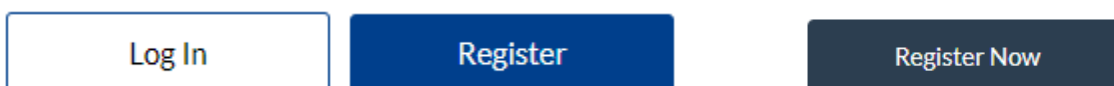
The InfraPortal has been designed to enable any user to search and obtain information surrounding existing infrastructures without the need for a user account.

However, if you want to upload or modify any information on the InfraPortal then you will need to create an account.

## Creating an account

If you're part of a UK institution that provides research and innovation resources to the academic and industrial community, you can register your resources as research and innovation infrastructures on the InfraPortal.

1. Click on 'Register' in the top right-hand corner, or "Register Now" if you are coming via "Register My Infrastructure".



2. Complete the form and click "Create new account"
3. A one-time login link will be sent to you by email, use it to login and set a password and fill out the details in the form provided and click "Save". A green banner at the top of the page will indicate your changes have been saved.

To add new content to the InfraPortal, you must first create a group. If your team is already registered, ask your team members to add you to the group (see *adding new members*), otherwise see the 'create new group' section of this guide.

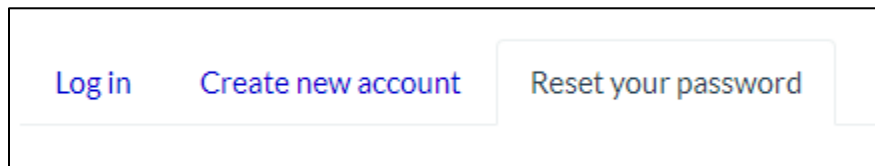
## Resetting an account password

To reset an account password:

1. Click 'Log in' in the top right-hand corner of the website



2. Select the 'Reset your password' tab

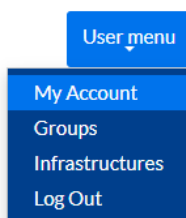


3. Fill in the form with your username or email address
4. Password reset instructions will then be sent to your registered email address

## Deleting your account

If you no longer use the InfraPortal or are no longer affiliated to any infrastructures, then you may wish to cancel your account.

1. Login to the website and select 'My account' from the user menu located in the top right-hand corner of the website.



2. Scroll to the bottom of the page and click 'delete account'. Confirm by clicking delete account again on the next page.

which institution are you from:

### Locale settings

#### Time zone

London

Select the desired local time and time zone. Dates and times throughout

Save

Delete account

Home

Map

Case Studies

About

Support

User menu

## Are you sure you want to delete your account?

Please note: This action can not be undone.

Your account will be deleted and you will no longer be able to log in. All of your content will remain attributed to your username including groups that you created still listing you as the owner. If you would like for your data to be removed completely, please contact the InfraPortal team: [infraportal@ukri.org](mailto:infraportal@ukri.org)

Delete account

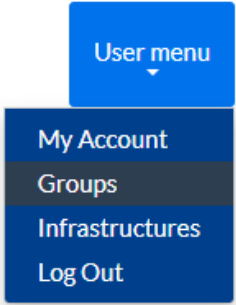
Cancel

3. You will receive an email providing a link to delete your account. *Please note, after clicking on this link your request has been completed and it cannot be undone.*
4. After clicking on this link, you will receive another email confirming that your account has been deleted. If you'd like for us to remove all your user data completely, please contact us at [infraportal@ukri.org](mailto:infraportal@ukri.org)

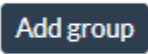
## Creating a Group

Any new content added to the InfraPortal needs to be assigned to a group. The first step to creating content is to first create the group in which the content will sit.

1. Once you have logged in, click on "Groups" from the user Menu



2. Click on “Add Group” found at the top left of the page.



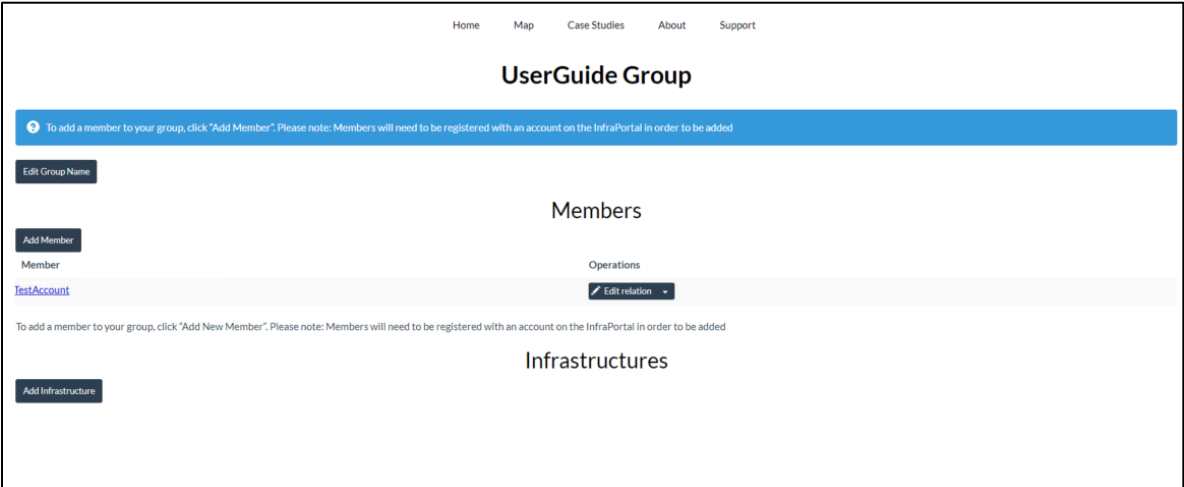
3. Enter a name and click the “Create infrastructure group and become a member” button. You will automatically be added as a member to any group you create.

Title\*

UserGuide Group

Create infrastructure group and become a member

4. Once you have created your group, you will see the following group overview page. From here, you can add Infrastructures and Members to your group. Please see “Registering A New Infrastructure” and “Add a Member to a Group” sections of this guide for further information and steps for these actions.

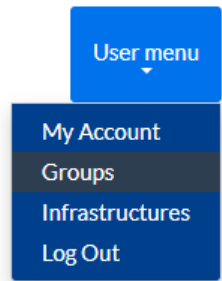


Add a member to a group

An individual must be registered on the InfraPortal before they can be added to a group. To register, please see the 'Creating an account' section of this guide.

After the person has registered a user account:

- 1. Go to the Groups page by clicking the 'Groups' link under 'User menu' in the top-right. This will display a list of groups that you are a member of:



- 2. Click the group to which you'd like to add a new member to.

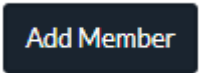
Add group

Groups

Welcome to your groups page. From here you can see all the groups you have either created or are a member of. To see more detail for each group, click on the group name

Group ID	Name	Type	Owner
764	<a href="#">Test Group</a>	Infrastructure group	JoThomas
777	<a href="#">SB Test Group</a>	Infrastructure group	steph
779	<a href="#">User Guide Group</a>	Infrastructure group	StephTestAccount
780	<a href="#">User Guide Group</a>	Infrastructure group	StephTestAccount

- 3. Click the "Add Member" button.



- 4. Enter in the username of the person you'd like to add and click "Save".

User\*

The user you want to make a member

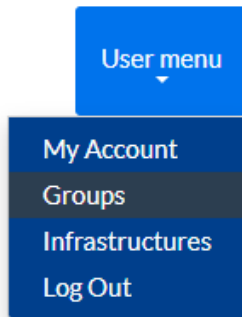
Roles

✓ Save

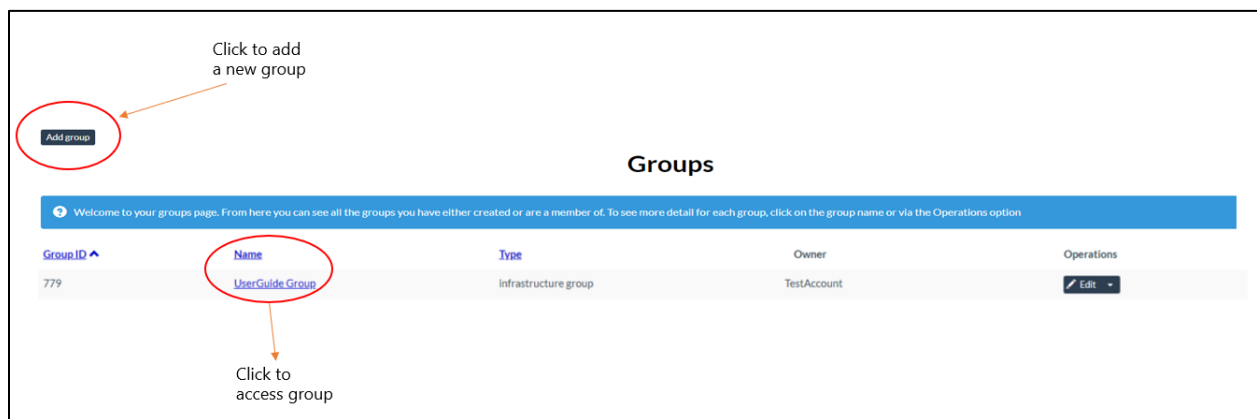
## Registering a new infrastructure

Please see the [“About”](#) page for further information on the content hosted by this website. Please note, you must register an account with InfraPortal and create a group before you can add Infrastructure content to the site.

1. Once you have created your Group (please see “Creating a Group” section of this guide), you can create content to register your Infrastructure. If you are logging into the system to do this, log in and select “Groups” in the user menu



2. If you need to register the infrastructure under a new group, click the “Add group” button found at the top left of the page, otherwise click on the group name you want to add it to.



3. Click on Add Infrastructure found at the bottom left of the page.



Add Infrastructure

4. Fill out the form that appears. There is help text under each box describing what to enter. Take a look at some existing entries on the portal for inspiration, particularly keywords, or send an email to [infraportal@ukri.org](mailto:infraportal@ukri.org) if you're unsure about what to put.
5. If required, you add more than one address to your Infrastructure. To do this, click the “Add Another Item” button under the address field in the form. This will create additional address entries. You can also reorder your address priorities by dragging and dropping them.

*Please note, if you need to remove a second address, simply put the country option back to “none” this will remove from the published content*


Add another item

6. When you're finished, scroll to the bottom and select 'Submitted for approval' from the dropdown options to submit the information for approval and publication.
7. If you would like to finish editing the content later, select 'Save draft' and click 'Save'. Once you are ready to submit, change the status to 'Submitted for approval' for approval and publication.

Assistive Image

Choose File

No file chosen


[Upload requirements](#)

Save as

Submitted for approval

Save Draft

Submitted for approval

8. Once submitted, you will be taken to your group page. A green banner will indicate this action has been successful and will now display the newly entered Infrastructure under “Infrastructures”

- You can view your infrastructure page by clicking its name. A page showing your infrastructure, will look something like the below.

All infrastructures submitted to the site will display in a pink text box prior to publication. Once submitted, your infrastructure will be reviewed by a member of the UKRI Infrastructure Team. Once approved, your infrastructure will be publicly visible and look something like the below. You will receive an email once the response has been made.

View

Edit

UserGuide Infrastructure 3

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Disciplines

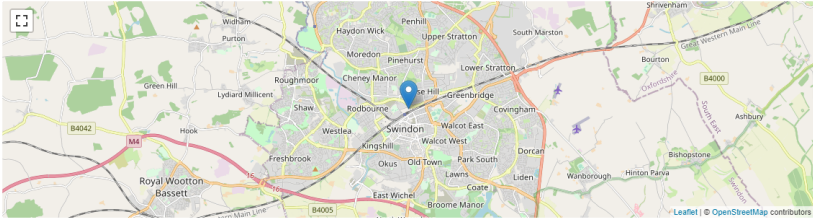
Physical Sciences & Engineering

Keywords

User Guide

Testing

Example



Last updated on: 27 Nov 2020 : 09 am

Get in Touch

Website Address

<http://www.infraportal.com>

Public Contact Email

[stephanie.bonehill@ukrl.org](mailto:stephanie.bonehill@ukrl.org)

Contact Telephone Number

07562169788

Address

Polaris House  
South West  
SN2 1FL  
United Kingdom

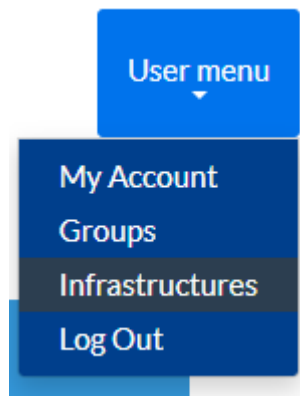
10. On your Infrastructures page, the moderation state column in your Infrastructures table will show the current stage in the approval process, such as submitted for approval, approved, or more information requested. If the status column says unpublished, then the entry is not yet publicly visible. If it says published, then it is visible. Once an entry has been approved by the InfraPortal team it will automatically become published.

Infrastructures			
<div>Add Infrastructure</div>			
Infrastructure	Operations	Moderation state	Notification Email
<a href="#">UserGuide Infrastructure</a>	<div>View entity</div>	Approved and published	

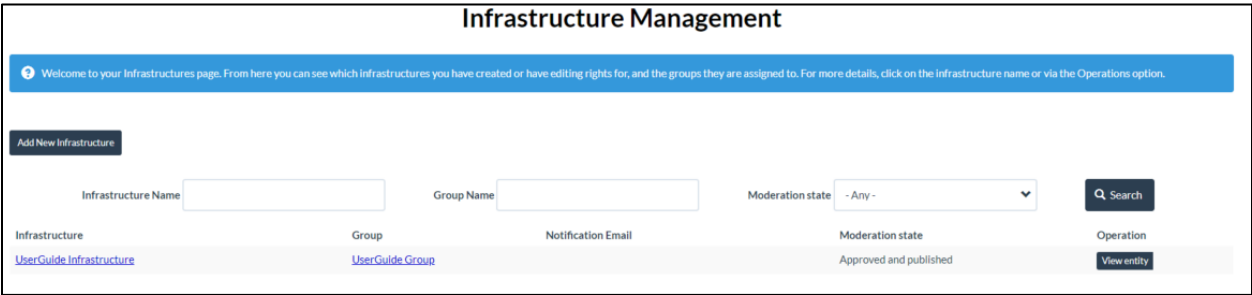
*Please note, once your infrastructure has been approved, you will be required to confirm the information is up to date once for each subsequent year that it remains published. In addition, access to your account will be required to edit any information uploaded to the InfraPortal.*

Infrastructure Management

- 1. Once logged in, click the Infrastructures” link under 'User menu' in the top right:



- 2. This will display your infrastructure management page which contains a list of all the infrastructures that you have permission to edit. You can click on the Infrastructure title or ‘view entity’ to go to the corresponding infrastructure page. You can then click the edit tab to make changes and updates to your infrastructure.



You can also filter your infrastructures using the various search criteria as outlined below. These search functions are particularly useful if you have multiple infrastructures, in multiple groups and moderation stages.

### Infrastructure Management

Welcome to your Infrastructures page. From here you can see which infrastructures you have created or have editing rights for, and the groups they are assigned to. For more details, click on the Infrastructure name or via the Operations option.

**Add New Infrastructure**

Infrastructure Name	Group Name	Notification Email	Moderation state	Operation
<a href="#">UserGuide Infrastructure</a>	<a href="#">UserGuide Group</a>		Approved and published	<a href="#">View entry</a>

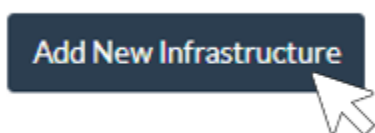
Search and filter by Infrastructure name

Search and filter by Group the Infrastructure belongs to

Search and filter by moderation state of infrastructure

- Use the “Add New Infrastructure” button to create a new infrastructure. By clicking this button, the system will first ask you which group you’d like to assign the new content to. If the appropriate group does not yet exist, please create this first – see “Creating a Group” section of this guide. If the group appears, click “Add New Infrastructure”.

*Please note, all groups listed on this page are those that you have created or are a member of. If you wish to add the infrastructure to an alternative group, you must request to be included as a member to that group before you can move the content.*



### Create a Research and Innovation Infrastructure Entry

All infrastructures must first be assigned to a group. Please select the group you want to add a new infrastructure to. If you need to create a new group, please go your group page.

Search for a group that you are a member of

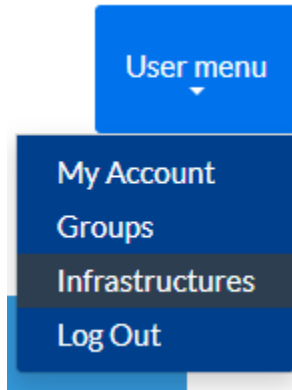
Group Name  Q Search

Test Group	<a href="#">Add Infrastructure</a>
User Guide Group	<a href="#">Add Infrastructure</a>
UserGuide Group	<a href="#">Add Infrastructure</a>

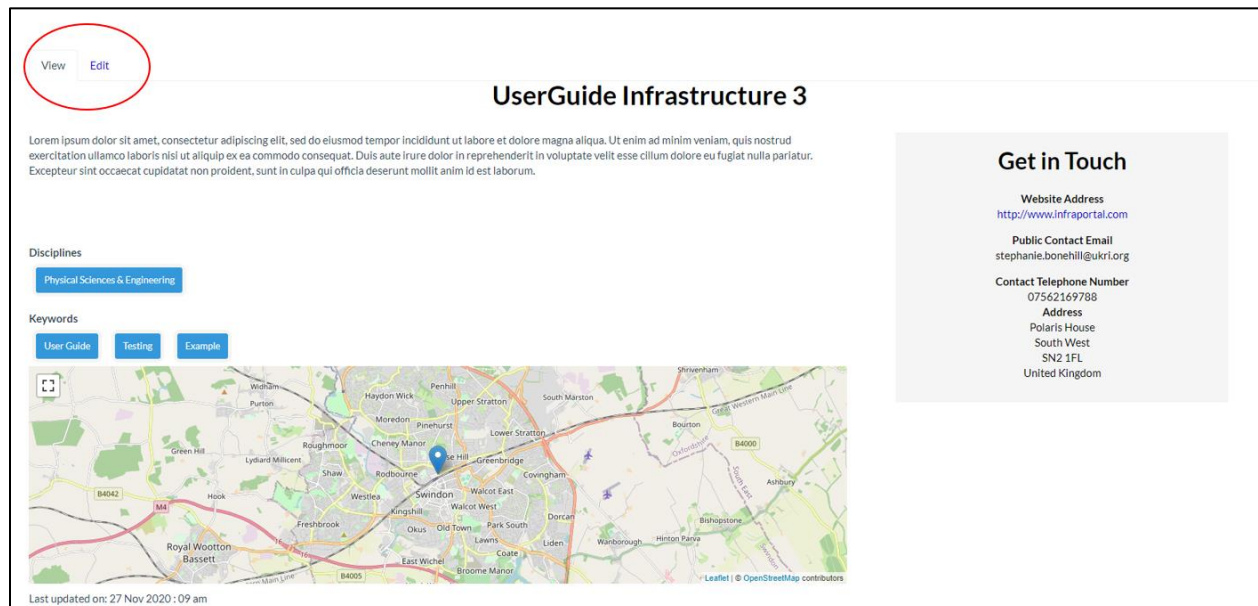
Select “Add Infrastructure” to add the new content to this group.

## Editing your existing Infrastructure

1. Once logged in, click the Infrastructures" link under 'User menu' in the top right:



2. Click on the name of the infrastructure you wish to make edits to and then select the edit tab on the Infrastructure page:



3. Review and edit any details in the form and click save at the bottom of the page. You can also preview your changes if you wish.

Entry manager

Assistive Image

Choose File

No file chosen

Upload requirements

Save

Preview

Last updated on: 24 Nov 2020 : 04 pm

If the update has been successful, you will be notified by the green banner at the top of the page.

Research and Innovation Infrastructure: **UserGuide Infrastructure 3** has been updated.

View

Edit

UserGuide Infrastructure 3

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Disciplines

Physical Sciences & Engineering

Keywords

User Guide

Timing

Example

Get in Touch

Website Address

<http://www.infraportal.com>

Public Contact Email

stephanie.bonehill@ukri.org

Contact Telephone Number

07562169788

Address

Polar's House  
 South West  
 SN2 1FL  
 United Kingdom

Last updated on: 27 Nov 2020 : 09 am

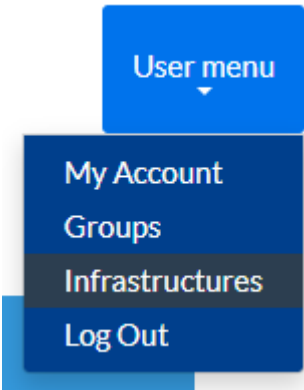
*Please note, you will need to set a notification email which will receive all notifications such as confirmation of approval and update requests.*

Responding to an information update request

- 1. Click ‘Log in’ in the top right-hand corner of the website and add your log in credentials.



- 2. Go to User menu and select Infrastructures. This page will display all your infrastructures and their associated groups. See the “Infrastructure Management” section of this guide for more information about this page and its functions.



Add New Infrastructure

Infrastructure Name

Group Name

Moderation state

- Any -

Search

Infrastructure

Group

Notification Email

Moderation state

Operation

UserGuide.Infrastructure

UserGuide.Group

Approved and published

View entity

- 3. Click on the name of the infrastructure you need to update.



#### 4. Click on the Edit tab

View

Edit

### UserGuide Infrastructure 3

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Disciplines

Physical Sciences & Engineering

Keywords

User Guide Testing Example

Last updated on: 27 Nov 2020 : 09 am

#### Get in Touch

**Website Address**  
<http://www.infraportal.com>

**Public Contact Email**  
[stephanie.bonehill@ukri.org](mailto:stephanie.bonehill@ukri.org)

**Contact Telephone Number**  
 07562169788

**Address**  
 Polaris House  
 South West  
 SN2 1FL  
 United Kingdom

#### 5. Review and update the infrastructure submission form and click save at the bottom of the form.

### Removing an existing infrastructure from InfraPortal

If you wish to remove specific infrastructures from the site, you will need to contact the InfraPortal team. Please contact [infraportal@ukri.org](mailto:infraportal@ukri.org) with the details of your request.

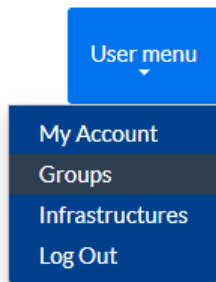
To remove all uploaded information, including your user account, please follow the 'cancelling or deleting your account' section of this guide.

## Transferring group ownership between accounts

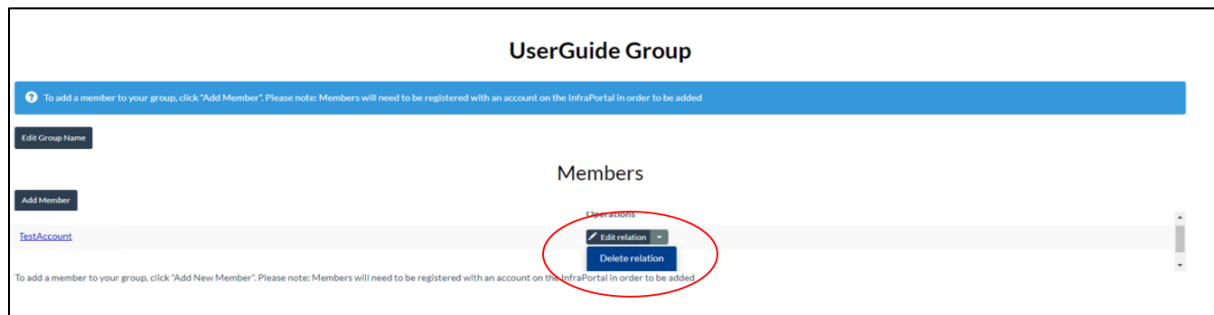
If you are the only member of the group, the best way to transfer ownership of a group between accounts is to add the new user to the existing infrastructure group by following the 'Adding a member to a group' section of this guide. Once the member has been added, you can then remove yourself from the group and cancel your user account.

After you've added the new user:

1. To remove yourself from the group, log into the website and select Groups from the user menu in the top right.



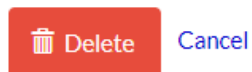
2. Click on the group name and under 'Members', in the 'operations' column, select the arrow next to 'Edit Relation' and click on 'Delete relation'



3. You will then be presented with a confirmation page to remove your group membership. Select 'Delete' to confirm.

*Please note, once completed this operation cannot be reversed.*

This action cannot be undone.



## Deleting a group

To delete a group, contact us at [infraportal@ukri.org](mailto:infraportal@ukri.org) from your registered email account with the name of the group you wish to delete.