SHRINE Data Steward Help

Contents

Introduction

The SHRINE Data Steward is a web application is used to submit, review, and approve SHRINE user Query Topic requests. You can access the Data Steward application from within the SHRINE Web Client query tool by clicking **Request New Topic** in the tool view.

Approval Modes

Each individual SHRINE institution can implement one of three different approval modes. The mode chosen by your institution determines the software configuration and functionality available in the Data Steward application. Consult with your institution's SHRINE contact if you are unsure about which mode is in place for your institution.

- **Manual Approval**—in this mode, every Query Topic must be manually approved by a Data Steward.
- **Automatic Approval**—in this mode, every Query Topic is automatically approved, but may be reviewed and manually rejected by a Data Steward.
- **Logging Only**—in this mode, Query Topics and are not used at all.

NOTE: In the Logging Only mode, Query Topics previously created under a different mode

will still display in the View Query Topics area. If no topics were previously created, this area will be empty.

User Roles

The Data Steward application can be used by both researchers who wish to perform queries in the SHRINE Web Client and Data Stewards who manage query topics for an institution or group of institutions.

Users logged in under either role will see **(Figure 1, 1)** a center panel containing lists of Query Topics and/or queries, and a left sidebar **(Figure 1, 2)** which allows you navigate between different areas in the center panel. However, the content of both the left sidebar and center panel will differ slightly depending on your role.

Figure 1

A main menu in the upper right **(Figure 1, 3)** displays the username currently logged in, a link to the Help documentation, and a logout link that specifies whether the current user has been assigned a Researcher or Data Steward role.

Using the Data Steward Application as a Researcher

Log into the Data Steward Application with credentials supplied by your institution. You will see the Researcher Logout option in the main menu, as well as two different options for viewing information about your query topics and history.

Viewing Query Topics

Select View Query Topics in the left sidebar to see a list of all your pending, approved, and rejected Query Topics.

Click any of the column headings (Figure 2, 1) to sort by Topic Name, Date Created, Last Updated, and State.

Figure 2

Click the **View** button (Figure 2, 2) next to any Query Topic to view the description and query history for that topic. Description information loads by default. If any queries have been performed for this topic, you will be able to see them by selecting the Query History tab (Figure 3, 1) at the top of the box.

Figure 3

Submitting New Query Topics

If your institution has implemented either the Automatic Approval or Manual Approval modes, you will need to submit a Query Topic before performing any queries in the SHRINE Web Client.

1. Click the blue **New** button (Figure 2, 3) at the top of the Query Topics panel.
2. In the **New Query Topic** box, enter a name for your topic and provide a short description of the types of queries you would like to perform on that topic.
3. Click Submit.
4. Your new Query Topic will now appear in Query Topics list.

NOTE: If your institution has selected the Manual Approval mode, your topic will be marked with a Pending status until a Data Steward has reviewed it. If your institution has selected the Automatic Approval mode, your topic will be immediately marked with an Approved status, but may be rejected at a later time after review by a Data Steward.

Editing Existing Query Topics

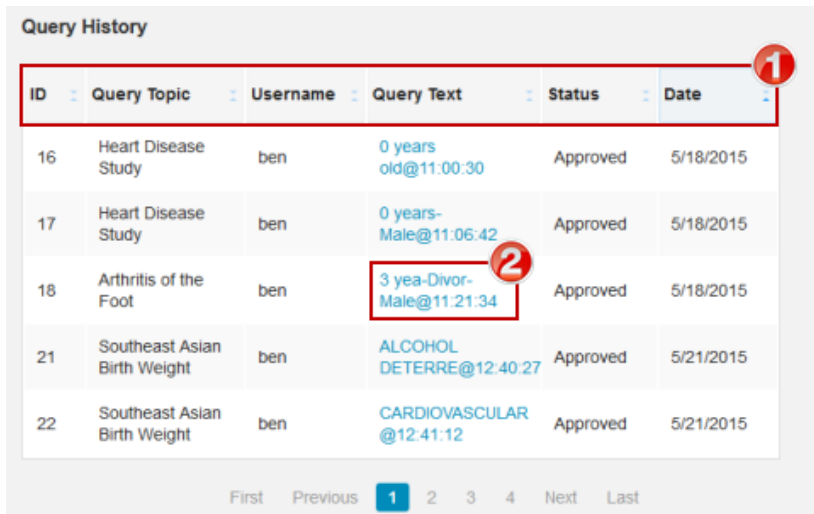Any topic that has a Pending status may be edited and resubmitted.

1. Click the **View** button (Figure 2, 2) next to any Pending topic.
2. Click the **Edit** button (Figure 3, 2).
3. Make the desired changes.
4. Click the **Update** button.

After a topic has been either approved or rejected, it can no longer be edited. To make an adjustment to an approved or rejected topic, submit a new topic with the desired changes.

View Query History

Selected View Query History from the left sidebar to view list of all queries you have performed.

Click any of the column headings **(Figure 4, 1)** to sort by query ID, Query Topic, Username, Query Text, Status, and Data performed. In almost all cases, the state will be Approved. However, in some cases, a previously approved topic may have been rejected by your institution's Data Steward.

Figure 4

Click the Query Text **(Figure 4, 2)** of any query to see a pop up containing the raw XML of the query string performed.

Using the Data Steward Application as a Data Steward

Log into the Data Steward Application with credentials supplied by your institution. You will see the Data Steward Logout option in the main menu, as well as three different options **(Figure 5, 1)** for viewing information about the Query Topics and queries submitted and performed by researchers at your institution.

View Query Topics

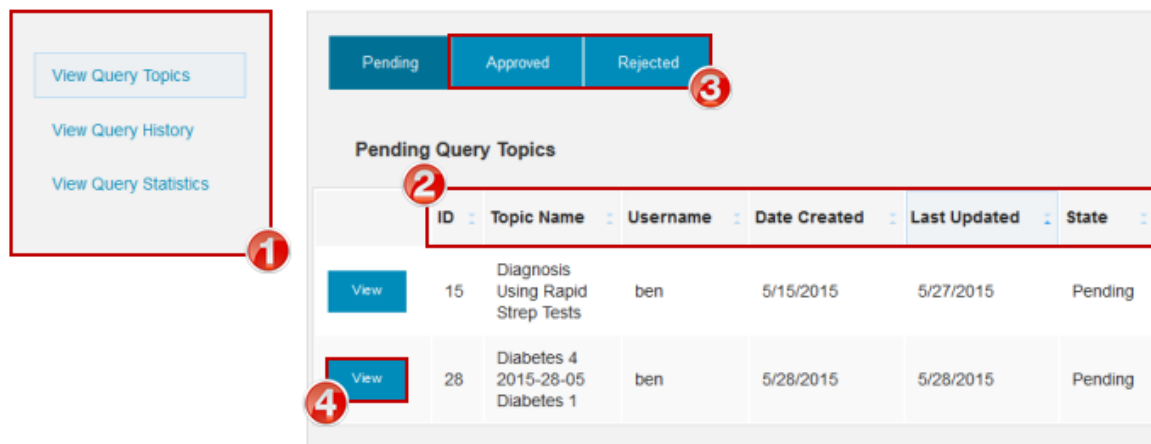Select View Query Topics from the left sidebar to see a list of all the Query Topics submitted at your institution.

Figure 5

Click any of the column headings **(Figure 5, 2)** to sort by topic ID, Topic Name, Username of the topic creator, Date Created, Last Updated, and State.

By default, only **Pending** topics display when the panel is loaded. To see all **Approved** or **Rejected** topics, select the corresponding tab at the top of the panel **(Figure 5, 3)**.

Click the **View** button **(Figure 5, 4)** next to any Query Topic to view the description and query history for that topic. Description information loads by default. If any queries have been performed for this topic, you will be able to see them by selecting the Query History tab **(Figure 6, 1)** at the top of the box.

NOTE: As queries can only be performed for Approved topics, the Query History tab is greyed out on all Pending topics.

Approving and Rejecting Topics

Query Topics should be approved or rejected according to your institution's review process.

1. Click the **View** button **(Figure 5, 4)** next to any topic.
2. Click the **Edit** button.
3. Select either **Approved** or **Rejected** from the Status dropdown **(Figure 6, 2)**.
4. Click the **Update** button **(Figure 6, 3)**.

Figure 6

NOTE: Once a Query Topic has been moved from the Pending status, it cannot be moved back to that status. However, a topic can be moved to the Approved or Rejected statuses as many times as needed.

View Query History

Select View Query History from the left sidebar to see a list of all queries performed at your institution.

Click any of the column headings **(Figure 7, 1)** to sort by query ID, Query Topic, Username, Query Text, Status, and Data performed. In almost all cases, the state will be Approved. However, in some cases, a previously approved topic may have been rejected after queries were run for it.

Figure 7

Click any Query Text link to see the raw XML of that particular query string **(Figure 7, 2)**.
View Query Statistics

Select View Query Statistics to see the number of Query Topics in each state **(Figure 8, 1)** and the number of queries performed by each user **(Figure 8, 2)** at your institution.

Figure 8

The default view covers a period of one week previous. To see statistics for another time period, select different dates in the **From** and **To** fields **(Figure 8, 3)**.

1. Manually specify the date range by typing directly in the date fields.

-OR-

2. Click anywhere in the date fields to select the desired start and finish dates from the calendar **(Figure 8, 4)**.
3. Click the **Apply Date Range** button **(Figure 8, 5)** to update the statistics shown below.