## **Upload CDEs and CRFs to the Standards Portal**

Communities want to upload CDE and CRF standards from caDSR to the Standards Portal for exploration, clarification, discussion, dissemination and evolution. A community must be authorized by the NCI standards portal administrators before they are allowed to upload content.

A special group site <u>https://nciphub.org/groups/standardsportaluploadauth</u> has been established at the Standards Portal so administrators can control, manage and track the process of authorizing communities for upload. Any user can request authorization to upload. The authorization group is accessible from the Standards Portal home page.



The process for uploading CDE and CRF standards includes four main steps:

**Step 1:** A community creates a Hub group site for upload staring here <u>https://nciphub.org/groups/new</u>. This is where the upload will take place.

**Step 2:** The community's group manager then goes to the NCI standards portal authorization group site <u>https://nciphub.org/groups/standardsportaluploadauth</u> to request authorization.

**Step 3**: Authorization is granted by NCI. A customized Wiki template is generated by NCI for the requesting group's upload and this template is sent to the community's group manager.

**Step 4:** The group manager pastes the Wiki template into the private area of the community's group site and uses it to upload the caDSR XML files containing CDE and CRF content.

Users can get to the authorization group site by clicking on REQUEST AUTHORIZATION TO UPLOAD on the Standards Portal home page. Instructions for the authorization process are listed at that group site.

NCIP	Standards Portal Authorization to Upload  Overview authorization to upload standards standards of standards portal ABOUT THE GROUP
Join Group	Does your community want to upload content at the Standards Portal?
Overview	Read this document first Standards Portal Guide to Upload Content for a detailed description of the process (September 25, 20
L Members	The Standards Portal uses the Wish List on this page for authorization requests.
QU Wiki 🛛 🙆	

## Details for Step 1 are listed below. Note that you must be a registered Hub user before you can create a group site at <u>https://nciphub.org/groups/new</u>.

Resources	Before you make your request for authorization:
🗬 Discussion	1. Create a group site for your upload click to create new group
🗭 Blog	2. Make your group invite only group membership must be invite-only
😵 Wish List 🛛 🕘	3 Add two tags to your group for your group must have these tags: Standards Portal and Standards IInload
🛹 Projects	tracking
🗰 Calendar	4. Add one tag to your group for your group should have this tag: Povided by name, where name is the search phrase you
Announcements	discovery want attached to your content.
	(Example: Provided by Adverse Events)
Collections	<ol> <li>Group manager must request authorization</li> <li>group manager must return to this page to make th authorization request from the Wish List</li> </ol>
Discoverability	

Make sure you have added the required tags for your group.

You are now ready to request authorization at the Standards Portal authorization group site <u>https://nciphub.org/groups/standardsportaluploadauth</u>. First you must click on Join Group to join the authorization group.

You are immediately accepted as a member of this group. You will make your request for authorization here at the Wish List in this group. Details for Step 2 are listed below:

quest authorization using the Wish List your Wish List request:	on this page :
Use the Wish List on this page	request authorization from the Wish List on this group page, you can also access the Wish List using the menu to your left
Include a link to your group site	we use your group link to return a customized wiki template to you for the upload.
Include your email address	you will receive an email with text to copy to your private group area, the text is the uploader template
Include the tag "Standards Upload"	we want to track your request for authorization
	quest authorization using the Wish List your Wish List request: Use the Wish List on this page Include a link to your group site Include your email address Include the tag "Standards Upload"

When you click on the Wish List at the Standards Portal authorization to upload group, you will see other requests to upload, some of which have already been granted.

andards Portal Authorization to Upload   Wish List			Add a new wish	
Prioritized List of Pending Requests (4)				
Request authorization to upload Demography Standards         Proposed by Ann Christine Catlin @ 11:19 am on 06 Mar 2014 • 0 🖓	0 **	0 🕈	GRANTED	
Request authorization to upload Eligibility Standards         Proposed by Ann Christine Catlin @ 11:18 am on 06 Mar 2014 • 0	0**	0 👎	GRANTED	
	0 🏎	0 👎	GRANTED	
TCGA would like to upload content at the NCI Standards Portal         Proposed by Ann Christine Catin @ 7:22 am on 06 Mar 2014 • 0 🖓	0 🍁	0 👎	GRANTED	

Click on Add a new wish to make your request. You need to be the group manager to make the request. Include the required link and tags in your request.

Ann Christine Catlin 11:18 am 06 Mar 2014	0 📫	0 👎
 Request authorization to upload Eligibility Standards		
Request authorization to upload to the group <a href="https://nciphub.org/groups/nci_eligibility">https://nciphub.org/groups/nci_eligibility</a> . I am the manager of that group. My ema <a href="https://nciphub.org/groups/nci_eligibility">acc@purdue.edu</a> .	il addres	s is
Eligibility < standards upload		
→ Move ◇ Make it private ✓ Edit ◇ Report abuse		

The NCI administrator will now consider your request:

The next step:	
Standards Portal administrators will consider your request and notif	y you by email when a decision has been made

The NCI standards portal administrator will first mark your request as Granted. This will track authorization requests for the Standards Portal.



The administrator will then generate and send a Wiki template customized for YOUR group that will allow you to upload your content to the Hub.

## To Authorize

Click on the Wiki for instructions (NCI administrators only)

The administrator will click on the Wiki in the left group menu of the Standards Portal authorization group.

Administrators who click on the Wiki menu option will see the page below – it describes how to generate the Wiki template and send it to the group manager requesting authorization. The administrator clicks the link Authorization Email Text.



The administrator selects the group that will receive the customized the template.

NCUP HUB A COLLABORATIVE FOR INFORMATICS IN CANCER RESEARCH
DISCOVER 🛩 🗌 COMMUNITY 🛩 📄 ABOUT 🛩 📄 SUPPORT 🛩 📄
Group: nci_tcga  Cenerate Cene
₩ in

The administrator then clicks the Generate button. An example Wiki is shown below. The administrator will cut and paste this wiki text (outlined in red) into an Email which will be sent to the group manager.

NCUP HUB A COLLABORATIVE FOR INFORMATICS IN CANCER RESEARCH
DISCOVER 🛩 🗏 COMMUNITY 🛩 🕴 ABOUT 🛩 🗏 SUPPORT 🛩 🗌
Group: nci_tcga

DISCOVER - COMMUNITY - ABOUT - SUPPORT -	<b>Q</b> Enter a k
Group: nci_eligibility • Generate	
"Upload your content" [[BR]][[BR]]] You are now authorized to upload your content at the NCI Standards Portal.	
You will upload XML files from caDSR to store in the Standards Portal Database. [[BR]] You will be able to provide additional annotations and search data for your content.	
الالحراية * Click to [/portal/nci_portal/show_upload.php?group=nci_eligibility UPLOAD your content] (group site managers only)	
[[BR]][[BR]] "Track and view your content" [[BR]][[BR]] For history of your uploads and additional search metadata assigned * Click to [/dataviewer/view/nci_portal/file_upload_log/?filter=nci_portal_data_upload_log.upload_group nci_eligibility track uploaded files, status, and links to content] for	this group
[[BR]][[BR]]] "Create a portal to promote your content" [[BR]][[BR]]]	
You should now create a portal group site to clarify, promote and disseminate your content to the wider NCI community. [[BR]]At that site, Hub visitors will be able to * discover and explore your content using DataViews and Hubgraph. * make change requests for your standards * start and continue discussions about your standards	
At your portal group site, you should provide references, links and documentation to clarify meaning and describe best practices for adoption of your standards. [[BR]] You can also create landing pages connected to your portal to promote your standards.	
Users will come to your portal group site to learn about your standards, ask questions about them, and adopt them for use in their research projects.	
	/

The administrator can now send an email to the manager of the group using the email in the Wish List request. The contents of the generated Wiki page should be copied to the email.

The administrator's job is now done.

As the group manager, you must now complete the process for preparing your group to upload content.

An email granting authorization will be sent to you from the NCI administrators. You should check your email to see if an authorization email has been sent. That email will contain the Wiki text you need for your upload group. Click this email to see the the Wiki text that you will **copy and paste to the Private Area of your upload group**.

Paste the Wiki text to the private area of your group.



## The final set of instructions at Authorization to Upload group

<u>https://nciphub.org/groups/standardsportaluploadauth</u> is shown below. You have already accomplished the first step – checking for the authorization email, opening the email, copying/pasting the Wiki text to your group site.

1.	You will get an email with a wiki template	a wiki template for uploading caDSR XML files at your Standards Portal group site will be sent to you. You will place the wiki template into the private area of your group site. You get to the private area of your group through <b>Edit Group Settings</b>
2.	Assemble your data at caDSR and save as XML	you need to assemble your CDEs or CRFs at caDSR, and save in XML file format. Only XML format files can be uploaded at the Standards Portal.
3.	Back at your group, click on the UPLOAD link in that template	You will click on the Upload link in the private area of your group site to upload your XM-format caDSR files. You will be able to add extra search tags and annotations to help users at the Standards Portal discover your content.
4.	You get a log that tracks your upload	You will see a log of your uploads and a DataView to browse and explore your uploaded content at the Standards Portal.
5.	You get a DataView link to explore your data	Click on the DataViews link to search, explore, filter, drill-down and link your standards.

In step 2 above, you need to assemble your content (CDEs, CRFs) at the caDSR repository and save as an XML format file. This XML format file will be uploaded to the Hub Standards Portal.



In this example, you have a CRF for Eligibility to upload at your group site. Click on the Upload link.

You are now ready to upload the XML file containing a CRF for Eligibility Standards to the Hub.

When you click on the link to UPLOAD your content, you will

- Browse to select your XML file
- Add public annotations and private annotations
- Add extra search tags (used in discovery)
- Click to upload

Note that there are two search tags, Standards Portal and Standards Upload, that are already assigned to your content.

oad Content Form:	
Select File (caDSR XML Format):	Choose File No file chosen
Private Annotations:	
Public Annotations:	
Extra Tags:	Standards Portal, Content Upload

Depending on the size of the XML file, your content may take some time to upload. There is a maximum file size of 100MB imposed by the Hub web server. When the data is loaded to the standards portal database, you will received a success status in the upload tracking log.

Show 10 v entries First Previous 1 Next Last Search:								
ID \$	Data File $\diamond$	Status ≎	File Size ≎ [MB]	File ≎ Type	Type ≎	Upload ≎ Date	Uploaded By 🗘	Public Annot
ID	Data File	Status	File Size [].	File T;	Туре	Upload Da	Uploaded By	Public Annotat
8	FormCart2_NCI_Standard_Eligibility_Template_08_16_2013.xml 🗠	Success 12	0.09	text/xml	CRF	2014-03-18 15:13:42	Sumudinie fernando 🗷	NCI Standard E

You will also receive links for DataViews, so you can immediately view the CRF standard you just uploaded. Scroll to the right to see all the information columns in the DataView.

Group Data Upload Log										
Show 10 v entries First Previous 1 Next Last Search:										
ID \$	Data File 0	Status ≎	File Size $\diamond$ [MB]	File ≎ Type	Type ≎	Upload ≎ Date	Uploaded By $\diamond$	Public Annotations	Private Annotatio	
ID	Data File	Status	File Size [A	File T <sub>y</sub>	Туре	Upload Da	Uploaded By	Public Annotations	Private Annotations	
8	FormCart2_NCI_Standard_Eligibility_Template_08_16_2013.xml 🗠	Success 🗷	0.09	text/xml	CRF	2014-03-18 15:13:42	Sumudinie fernando 🖙	NCI Standard Eligibility CRF Vers.	NCI Standard Eligibi	
Show 10	Show 10 • entries Showing 1 to 1 of 1 entries First Previous 1 Next Last									

Click the link to view your content:

Standards Portal CRFs Complete View by Selected Group  O Download X Fulscreen A Clear Filters X No-Wrap											
Show 10 V Upload A ID	entries Upload Group 🗘	File Name $\diamond$	Public Id 🗘	Fir Version ≎	st Previous 1 Context ≎	Next Last Created By \$	Date ≎ Created	Date ≎ Modified	Sea Modified By \$	rch: Long Name	
8	Upload Group	File Name	Public Id	Version	Context	Created By	Date Crest	Date Modific	Modified By	Long Name	
8	nci_eligibility	FormCart2_NCI_Standard_Eligibi	2960932	1.0	NCIP	COOPERM	2009-11-17	0001-01-01	-	NCI Standard Eligibility Templ	
Show 10 • entries Showing 1 to 1 of 1 entries First Previous 1 Next Last											

There are DataView links for viewing the content for each single upload and for all content uploaded by your group. There is also text to copy and paste the DataView URL to a customized resource or group area that you create for discussion, dissemination and clarification of your standards.