Table of Contents

Getting started

This user guide relates to RDA: a secure data upload service that replicates the split file process used to upload data in SAIL.

Where do I start?

Get started with the user guide by following the step-by-step Tasks or by viewing the User interface reference guide.

About this user guide

Learn about the basic structure of each help page in this user guide.

Key features

Brief highlights of what the RDA offers.

Where do I start?

This user guide is split into two main sections:

Tasks – step-by-step instructions

This section covers common user interface tasks, including creating Projects and uploading Datasets. Each page contains step-by-step instructions for completing a single task.

User interface – reference guide

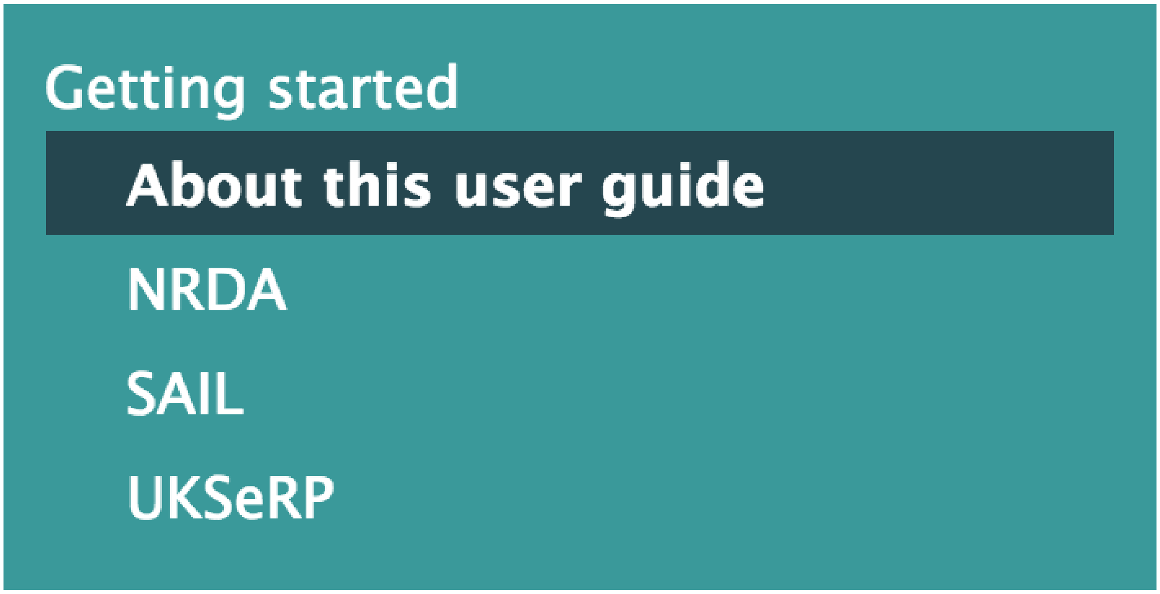
This section covers all relevant screens and options in the RDA user interface. It acts as a reference that contains definitions of all fields, menus and buttons.

About this user guide

This user guide relates to the RDA. For more information about the project, see the background pages on the Getting started page.

Page navigation

In addition to the main navigation menu at the top of the screen, a context-sensitive navigation menu appears to the right-hand side of each page. An example of this navigation menu is shown below:



On small screens, this navigation menu is hidden to save space.

Definitions

The RDA user interface contains a number of elements that are used to display, add, and manipulate data. Definitions of these elements look like the examples shown below:

Button

This is an example definition for a button

Checkbox

This is an example definition for a checkbox

Dropdown

This is an example definition for a dropdown menu

Field

This is an example definition for a field

Radio

This is an example definition for a radio button

Link

This is an example definition for a link

Notes

Important points of interest are shown in notes. An example note is shown below:

This is an example note.

Key features

The **Research Data Appliance (RDA)** is an electronic data catalogue system that allows for Dataset collection, management, documentation and local linkage. It has a range of applications such as audit, performance, benchmarking and commissioning.

Brings together diverse forms of data

The RDA aims to integrate diverse forms of data stored within multiple records systems, such as those that reside in hospitals. The RDA has also been designed to be as low a unit cost as possible to maximise the potential for RDAs to be used in a much larger number of organisations in future.

Sophisticated, deterministic and probabilistic data linkage

Integrated matching technologies are incorporated into the RDA, utilising state-of-the-art solutions such as those from Curtin University in Australia (an existing Farr Institute partner). This approach adds additional assurance to the de-identification process by allowing data owners to 'encrypt' the identifiers supplied as an input to our TTP system before supply, and for the RDA linkage module to perform high-quality matching on the hashed data, rather than on the identifiable data as currently happens.

Information governance controls

The RDA has built-in information governance controls that allow users to define roles, access controls and project permissions. Each RDA is able to interact with other RDAs (where agreement is in place) so that identity matching can occur across RDAs, and therefore across organisational boundaries and geographies, without the need to move sensitive data across. When a Dataset is transferred from one RDA to another, the Dataset documentation is also transferred, so that when the received data is loaded into the end system it is fully documented.

Dataset collection and versioning

The RDA provides the data-management infrastructure required to efficiently manage a variety of datasets. The RDA makes it easy for users of all abilities to submit Datasets through its simple user interface. It also allows users to publish different versions of a Dataset and to document the variations between each version.

Metadata capture and publishing

The RDA provides systematically gathered and shared information about the origins of each Dataset. All published Datasets can be viewed in the Local Data Catalogue. This part of the user interface provides a standard way of viewing key Dataset information. It also has links to relevant reference tables to facilitate interoperable studies.

Data quality measurement

RDA design includes basic automated quality measurement of all Datasets that are loaded by a data supplier. The system also lets users define simple rules about variable validation that will be viable as a marker of quality. The automated data quality validation checks take place during the Dataset publishing process and generates a report outlining the results of the analysis.

Learn more

For more information Contact us.

Tasks

This page lists common tasks that users perform through the user interface.

- Project tasks – instructions on how to perform tasks related to Projects and Sub Projects
- User tasks – instructions on how to perform tasks related to user accounts
- Data tasks – instructions on how to perform tasks related to Datasets
- Sharing tasks – instructions on how to perform tasks related to sharing Datasets

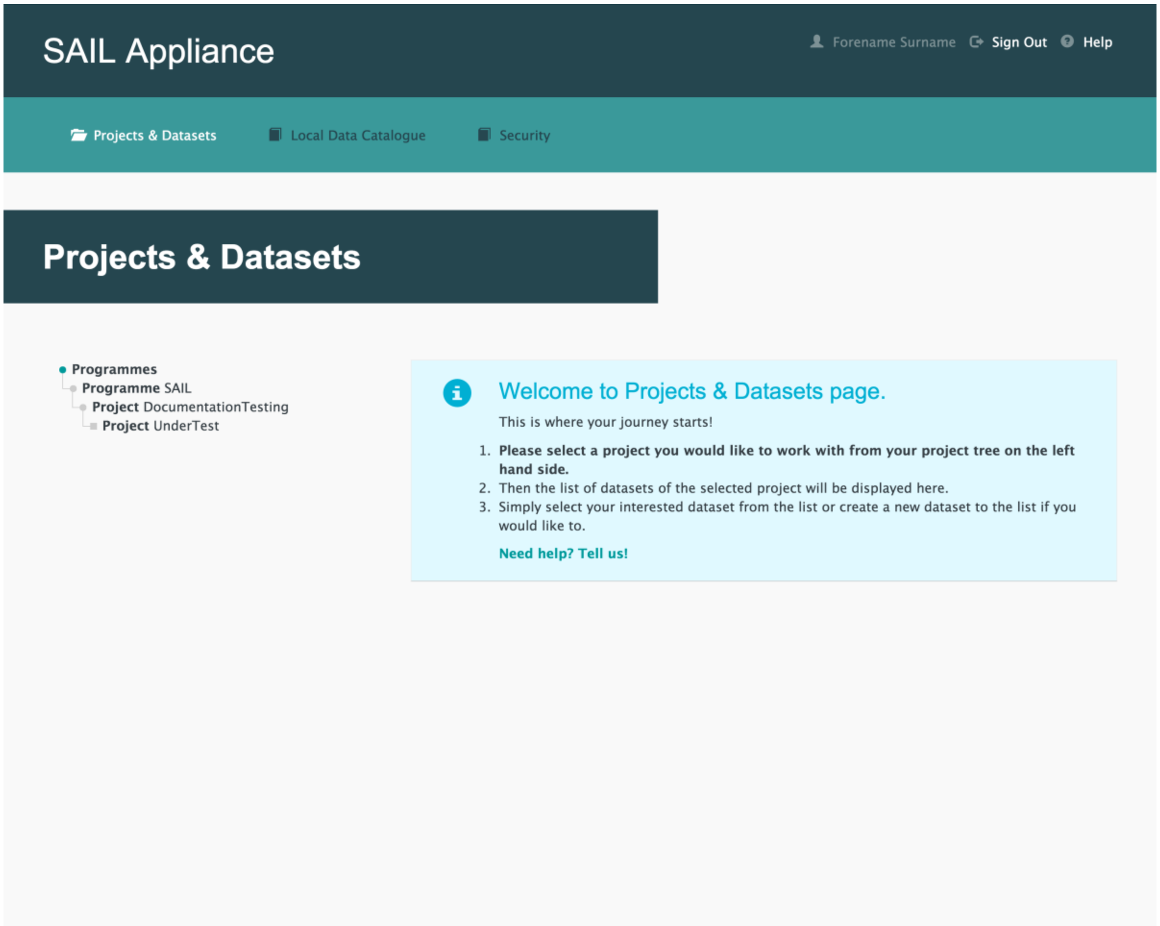
Project tasks

- How to create a Project – creating a Project via the Security page
- How to edit Project details – adjusting settings for an existing Project via the Security page
- How to add a user to a Project or Sub Project – adding a user to a Project or Sub Project via the Security page
- How to create or edit Roles – creating and editing Roles via the Security page
- How to set up/review a Project's Permissions and Capabilities – creating and editing Permissions and Capabilities via the Security page
- How to change a Project's Settings – editing a Project's settings via the Security page

How to create a Project

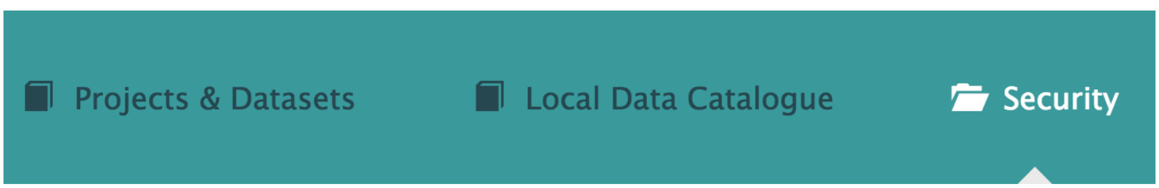
All users of RDA will be automatically assigned access to at least one Project, so there is no need to create a new Project before data are uploaded. However, it is possible to create a new Sub Project (a Project inside a larger Project). The following steps show how to create such a Sub Project.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

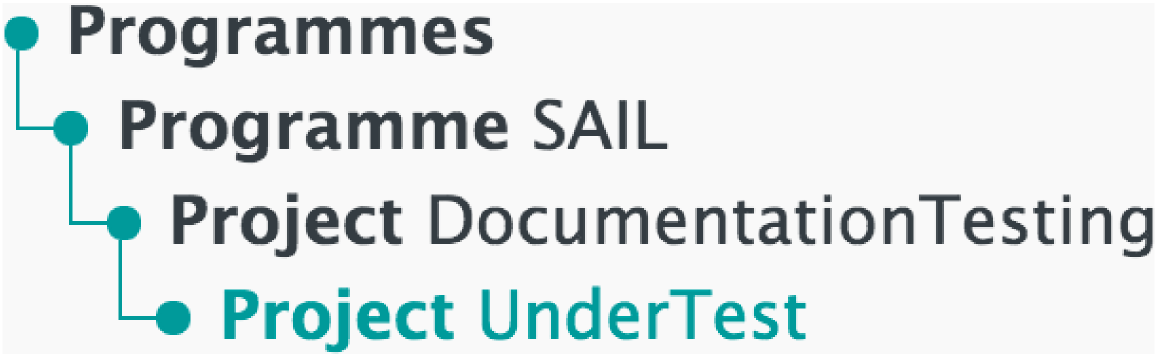


Security menu item

3. Click Projects (should be selected by default)

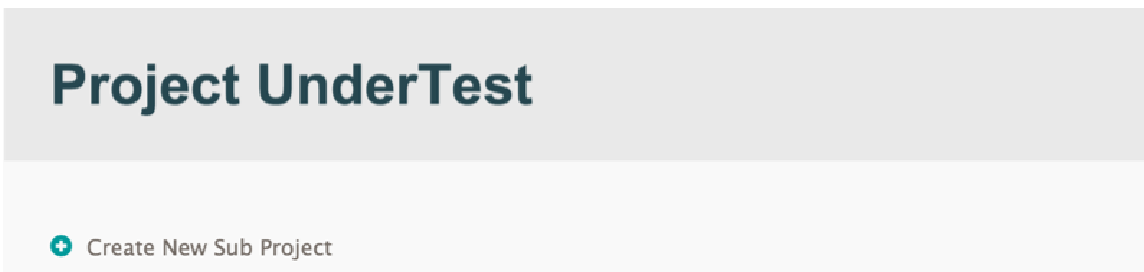
Projects menu item

4. Select a Project from the left-hand navigation menu



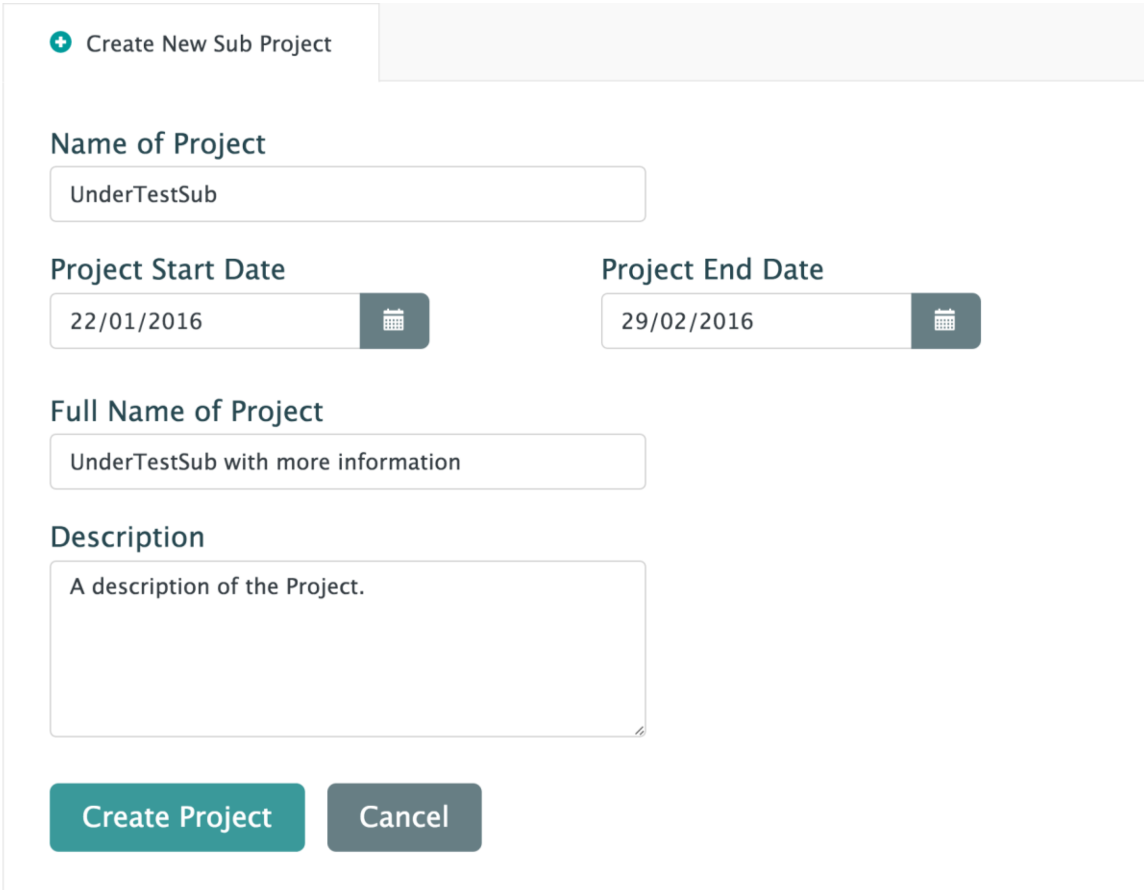
Left-hand navigation menu showing available Projects

5. Click Create New Sub Project



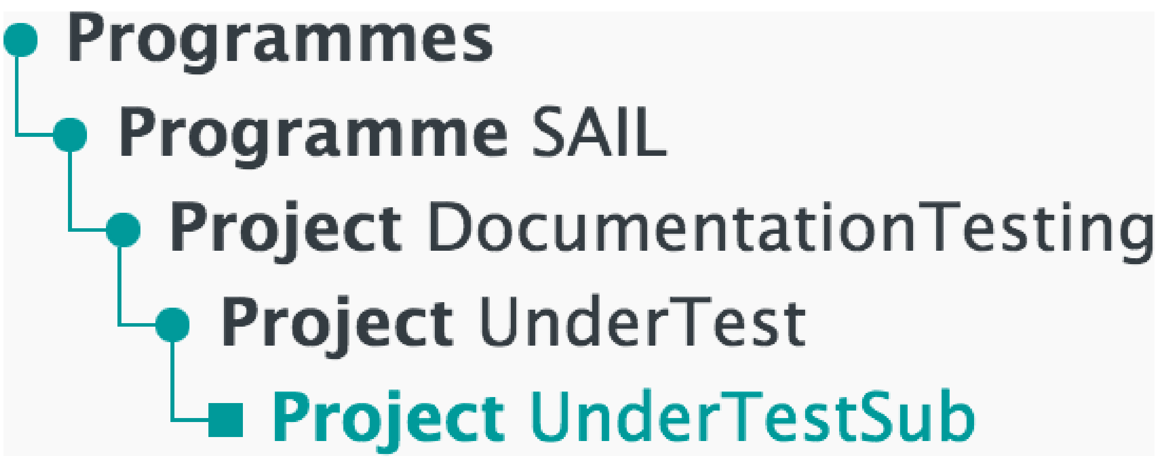
Create New Sub Project link

6. Enter the details, and then click Create Project



Create New Sub Project panel

Refresh the page to see the new Sub Project in the left-hand navigation menu:



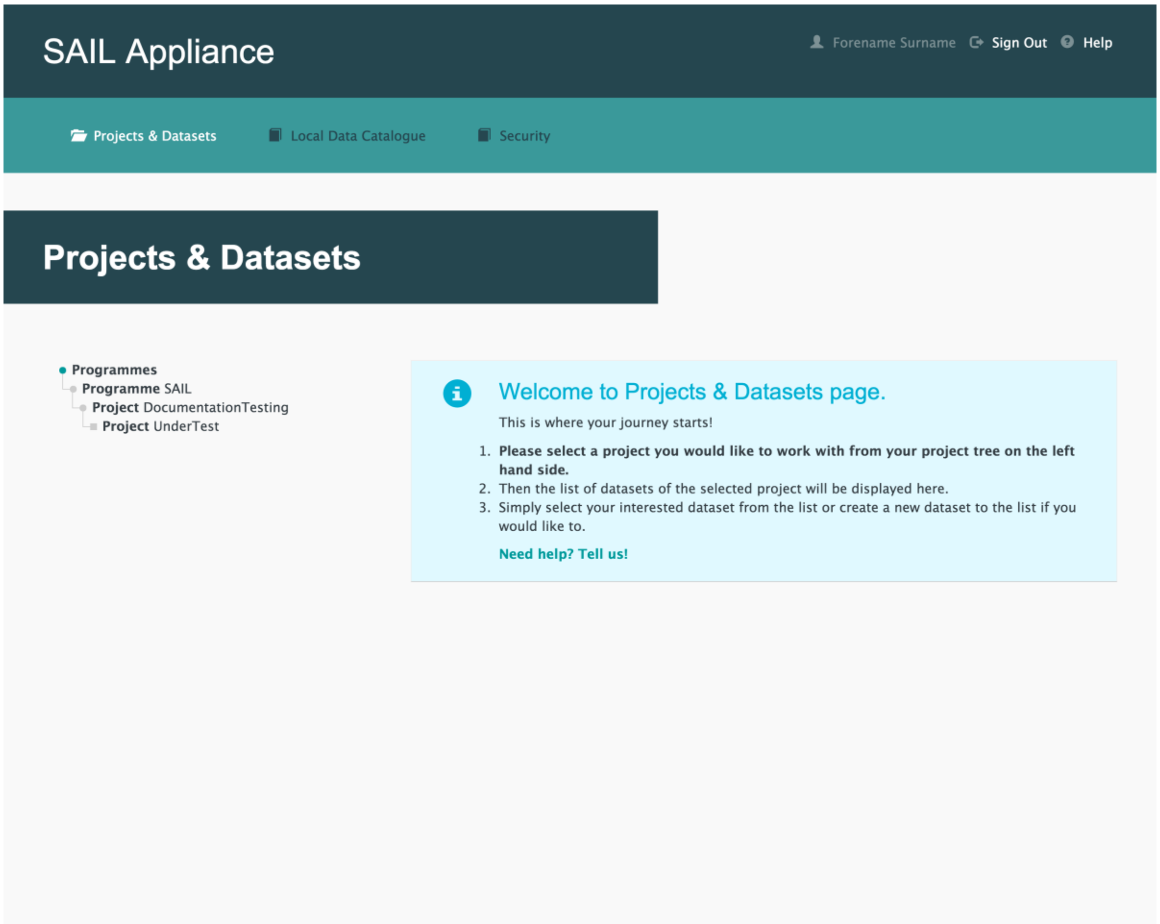
New Sub Project shown in the left-hand navigation menu

Once the Sub Project has been created, the user must create a Dataset before they can upload data. For more information, see How to create a Dataset.

How to edit Project details

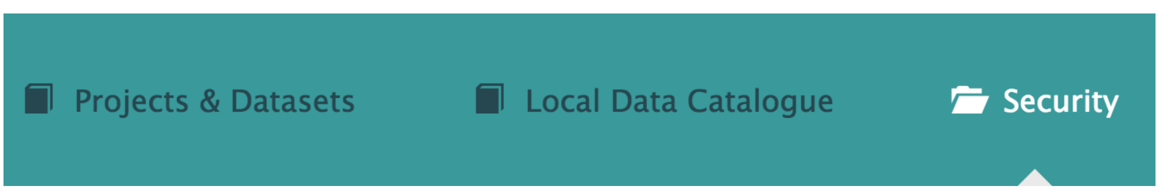
The following steps show how to edit the details of a Project or Sub Project.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

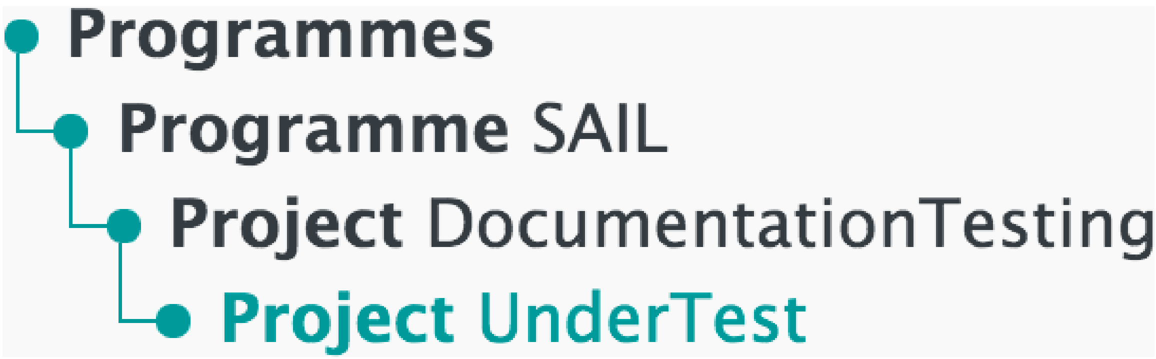


Security menu item

3. Click Projects (should be selected by default)

Projects menu item

4. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

5. Click and edit each of the sections to the right of the screen as appropriate

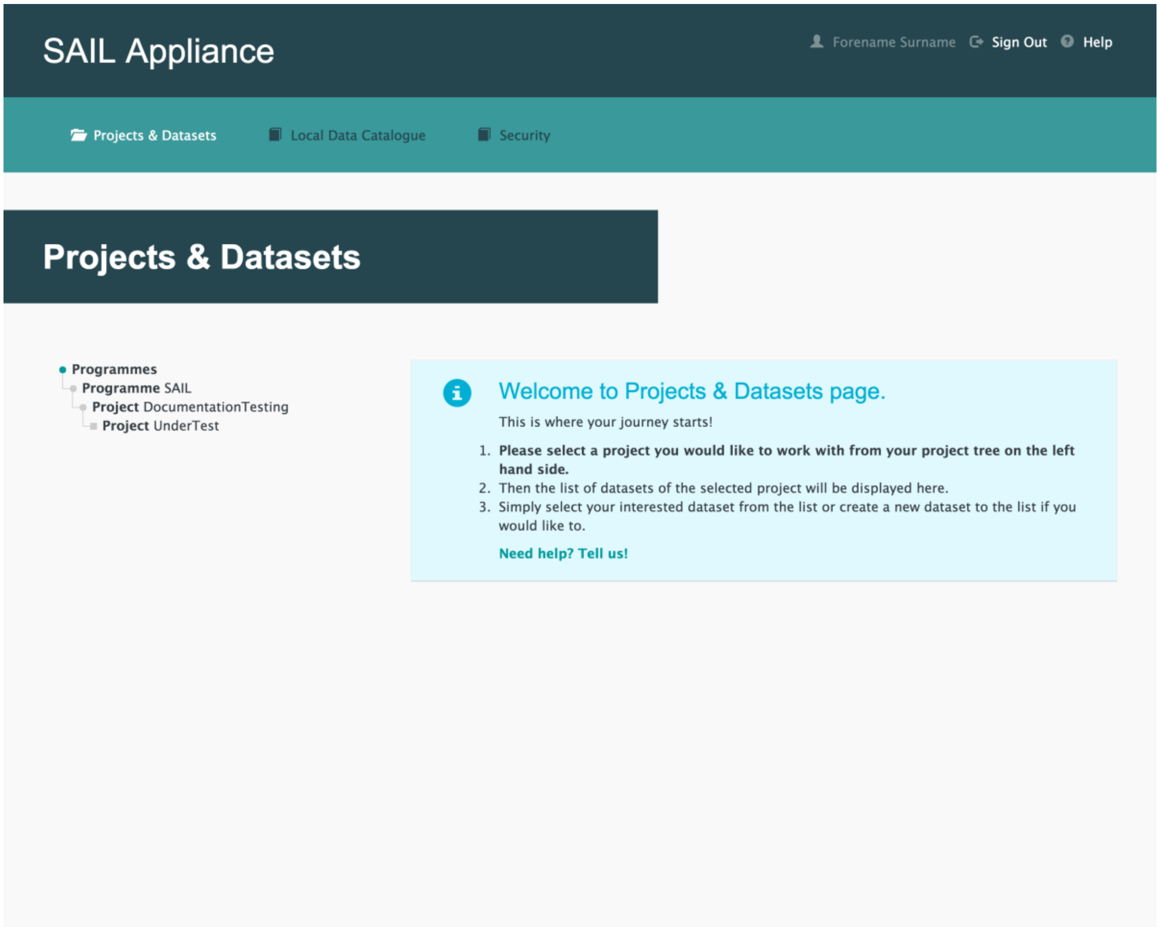
For more information, see the following reference pages:

- Basics
- Roles
- Permissions
- Capabilities
- Settings

How to add a user to a Project or Sub Project

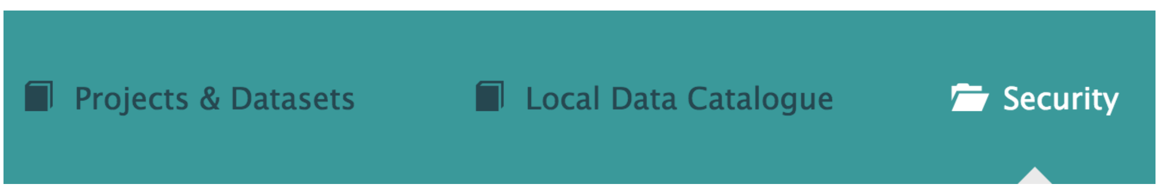
The following steps show how to add a user to a Project or a Sub Project.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

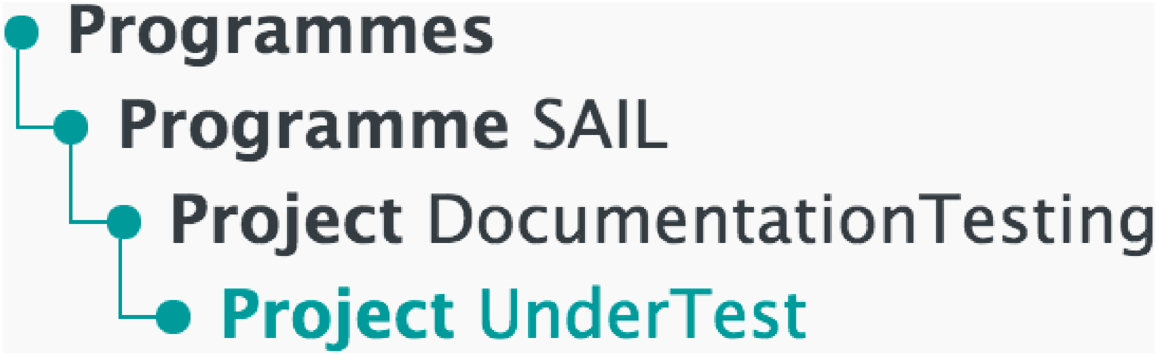


Security menu item

3. Click Projects (should be selected by default)

Projects menu item

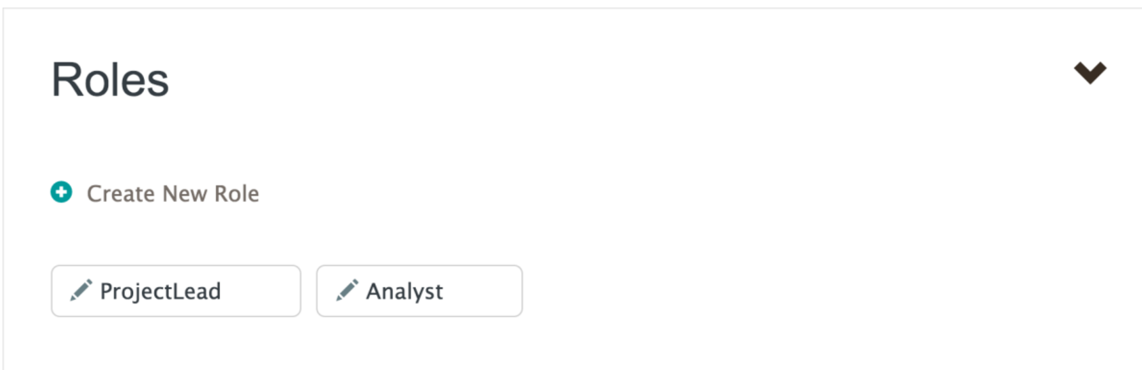
4. Select a Project from the left-hand navigation menu



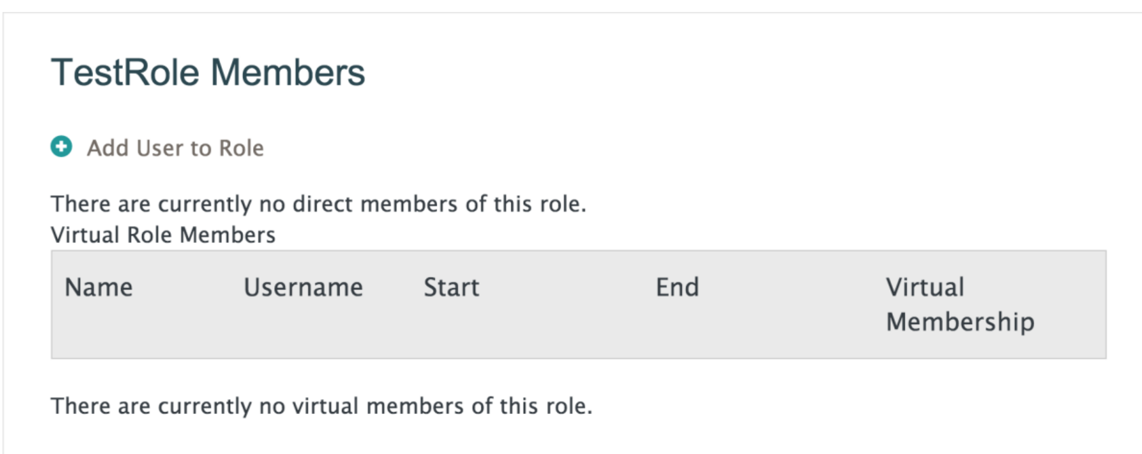
Left-hand navigation menu showing available Projects

5. Click **Roles**

An example of the Roles section is shown below:

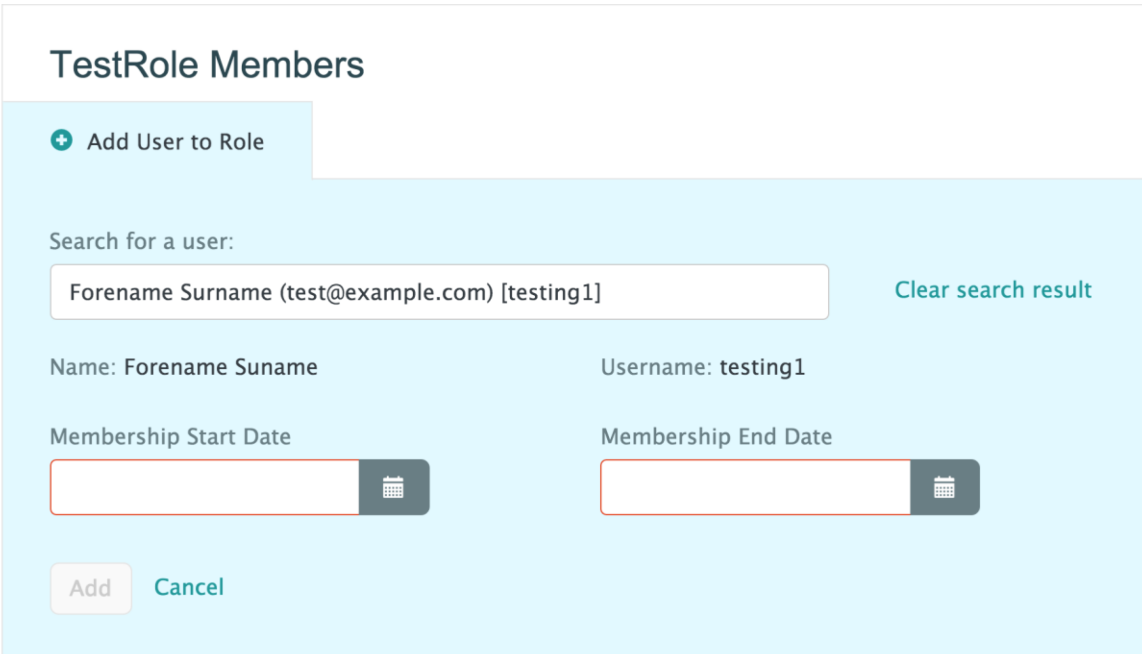


6. Click the Role for the user to be assigned to the Project
7. In the Members section, click Add User to Role



Click Add User to Role

8. Use the search field to find the user. To create a user account, see [How to create an account]
9. Set a start and end date for membership of the Role
10. Click Add



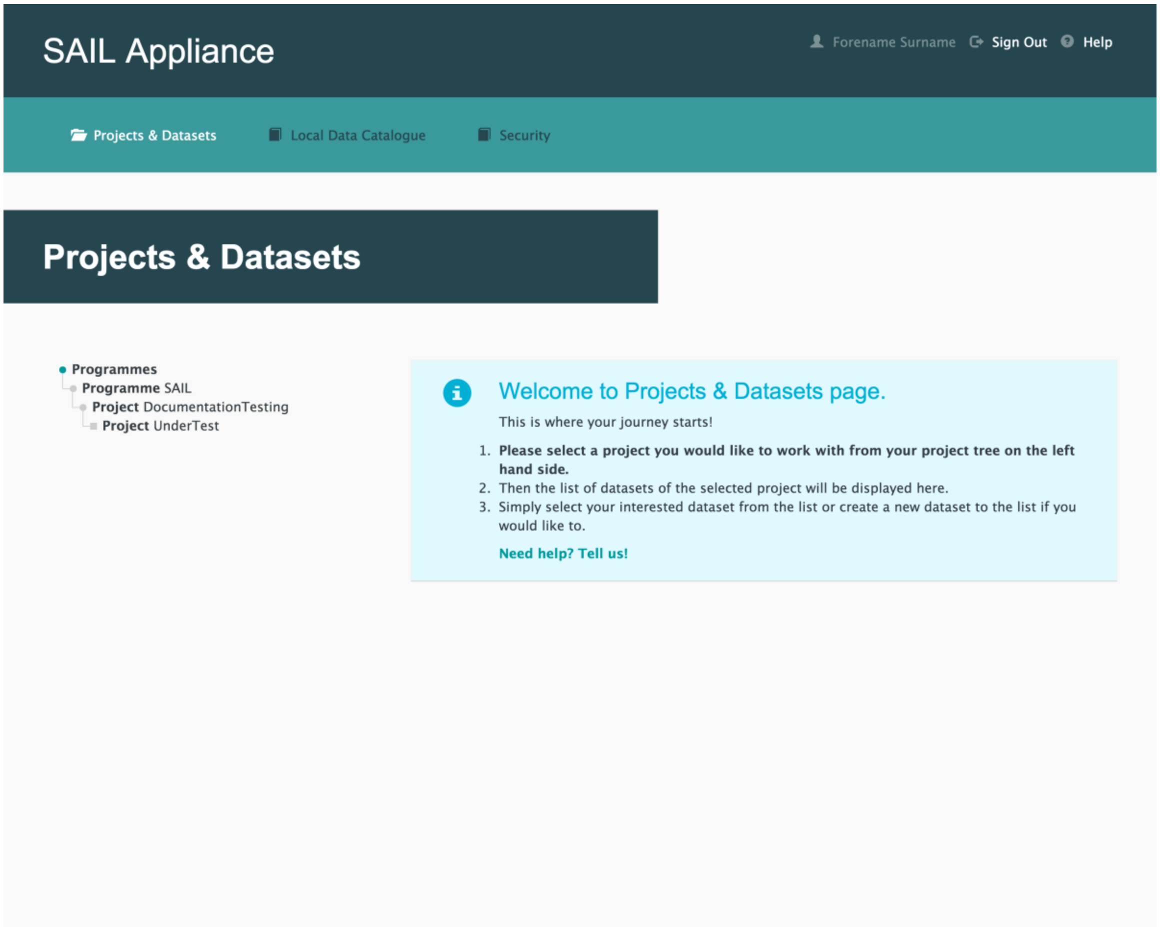
Select the user account to add to the Role

Once the user has been added to the Role, they will have access to the Project or Sub Project.

How to create or edit Roles

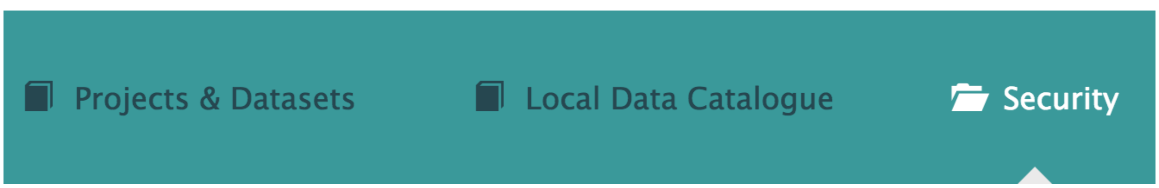
The following steps show how to create and edit Roles in a Project or Sub Project.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

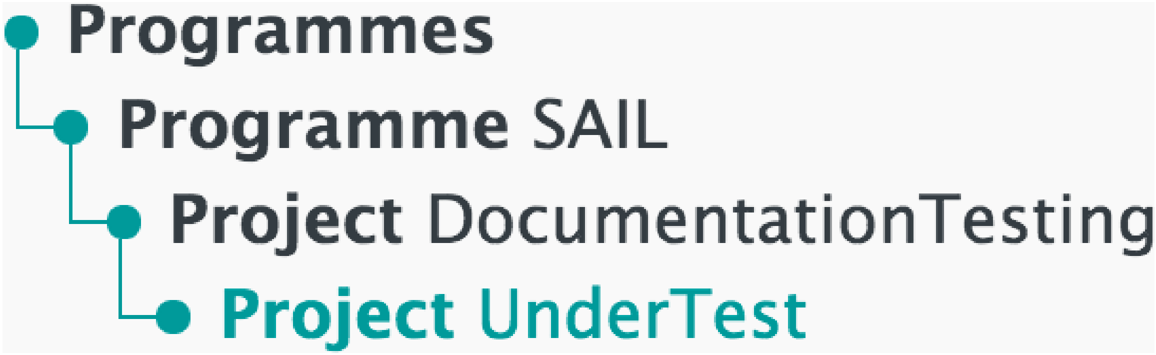


Security menu item

3. Click Projects (should be selected by default)

Projects menu item

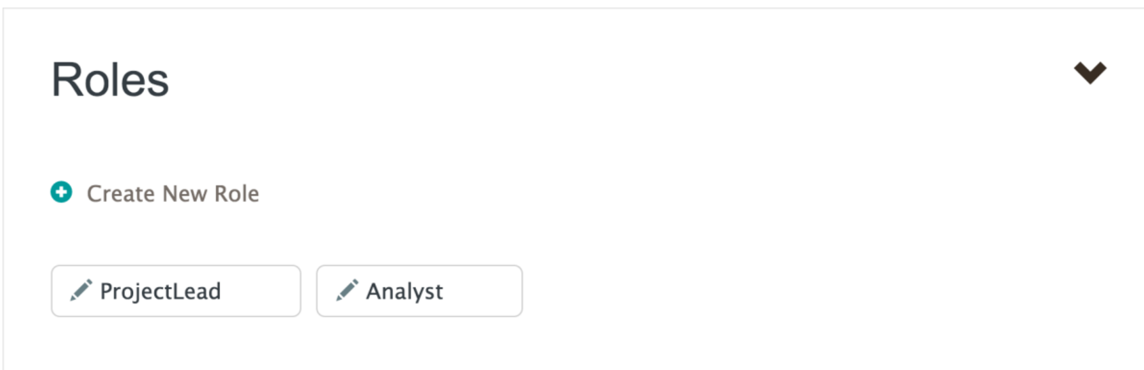
4. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

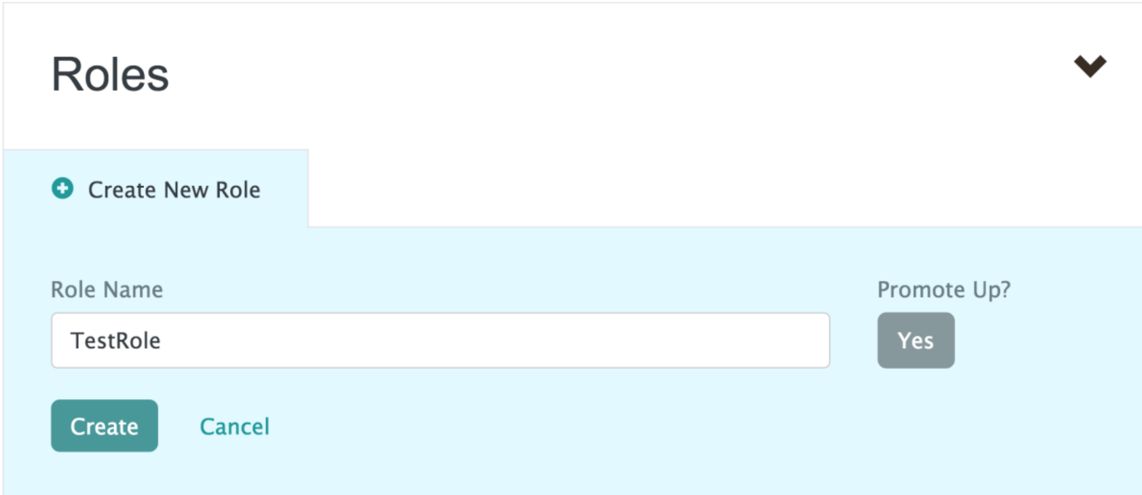
5. Click **Roles**

An example of the Roles section is shown below:



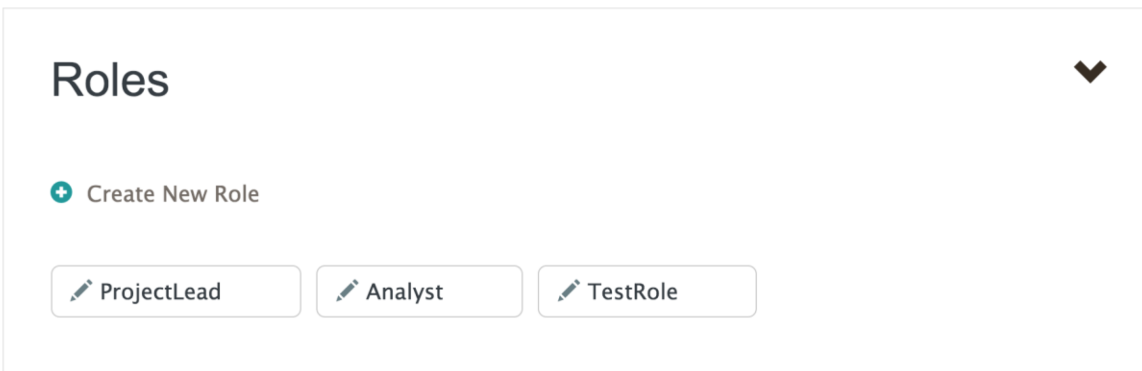
6. Click Create New Role
7. Enter a name for the new Role

The name must not contain any spaces.



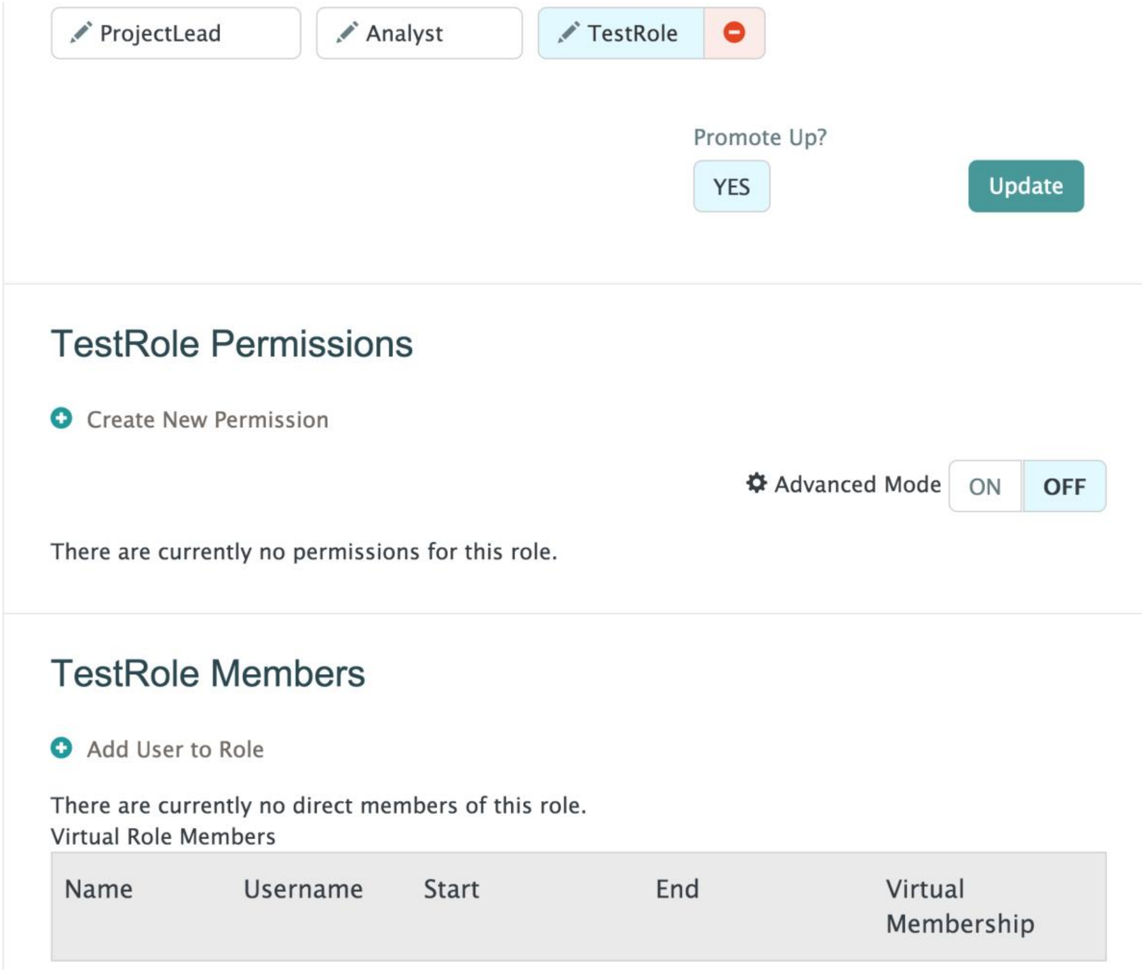
8. Click Create

The new Role will be displayed alongside other existing Roles in the Project.



9. Click the new Role to edit its details

The panel expands to allow new Permissions to be added to the Role, via the Create New Permission link. The panel also allows users to be assigned to the Role, via the Add User to Role link.

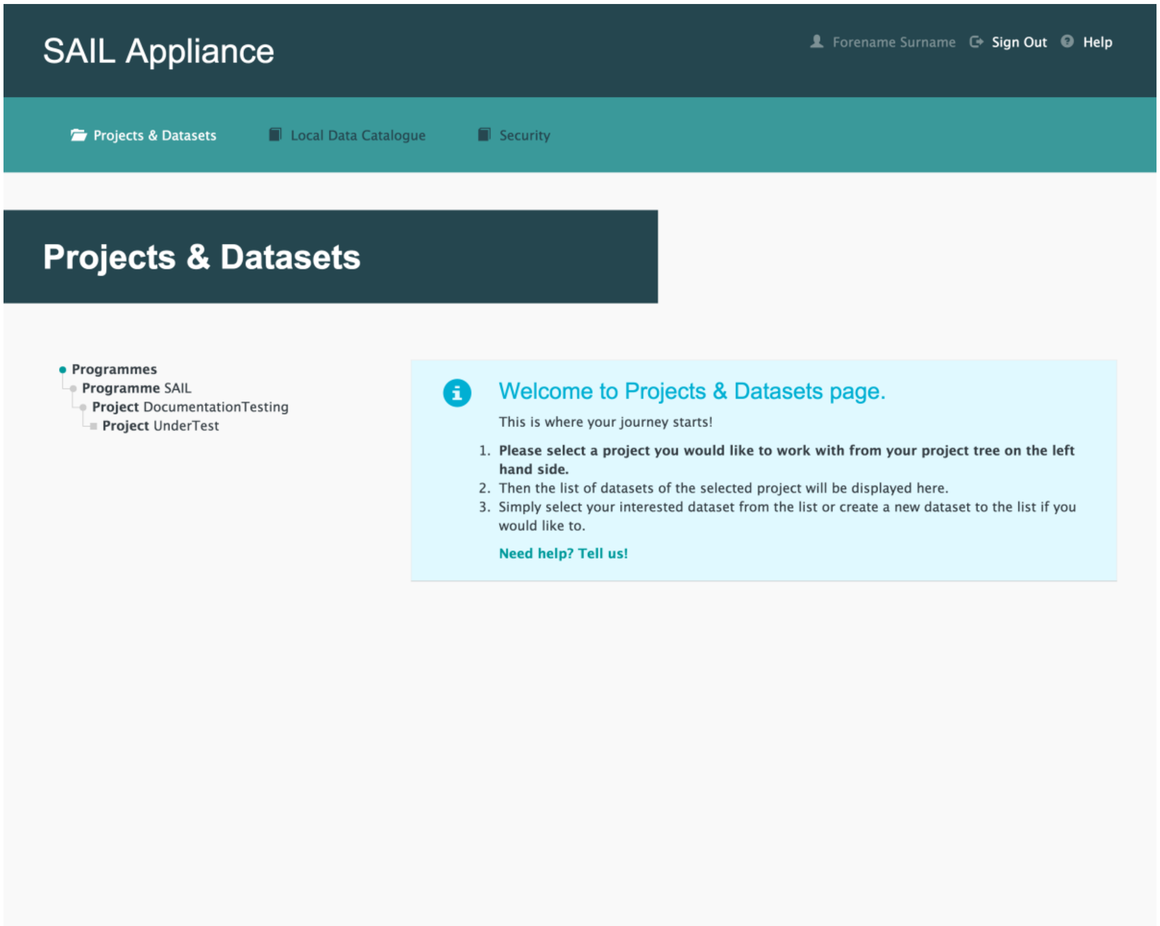


Expanded Roles panel

How to set up/review a Project's Permissions and Capabilities

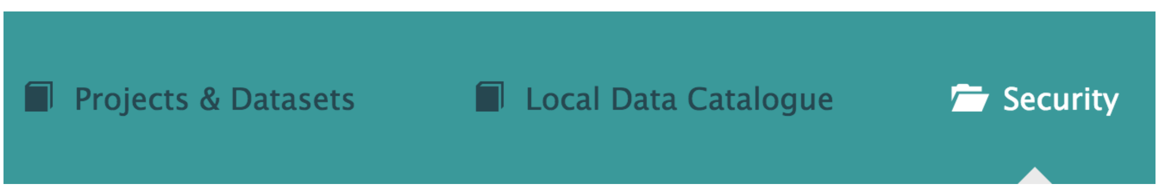
The following steps show how to set up and review a Project's Permissions and Capabilities.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

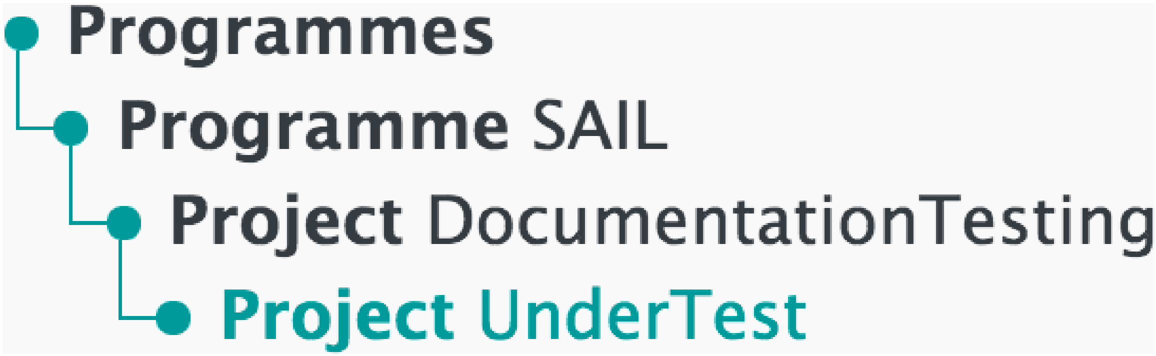


Security menu item

3. Click Projects (should be selected by default)

Projects menu item

4. Select a Project from the left-hand navigation menu



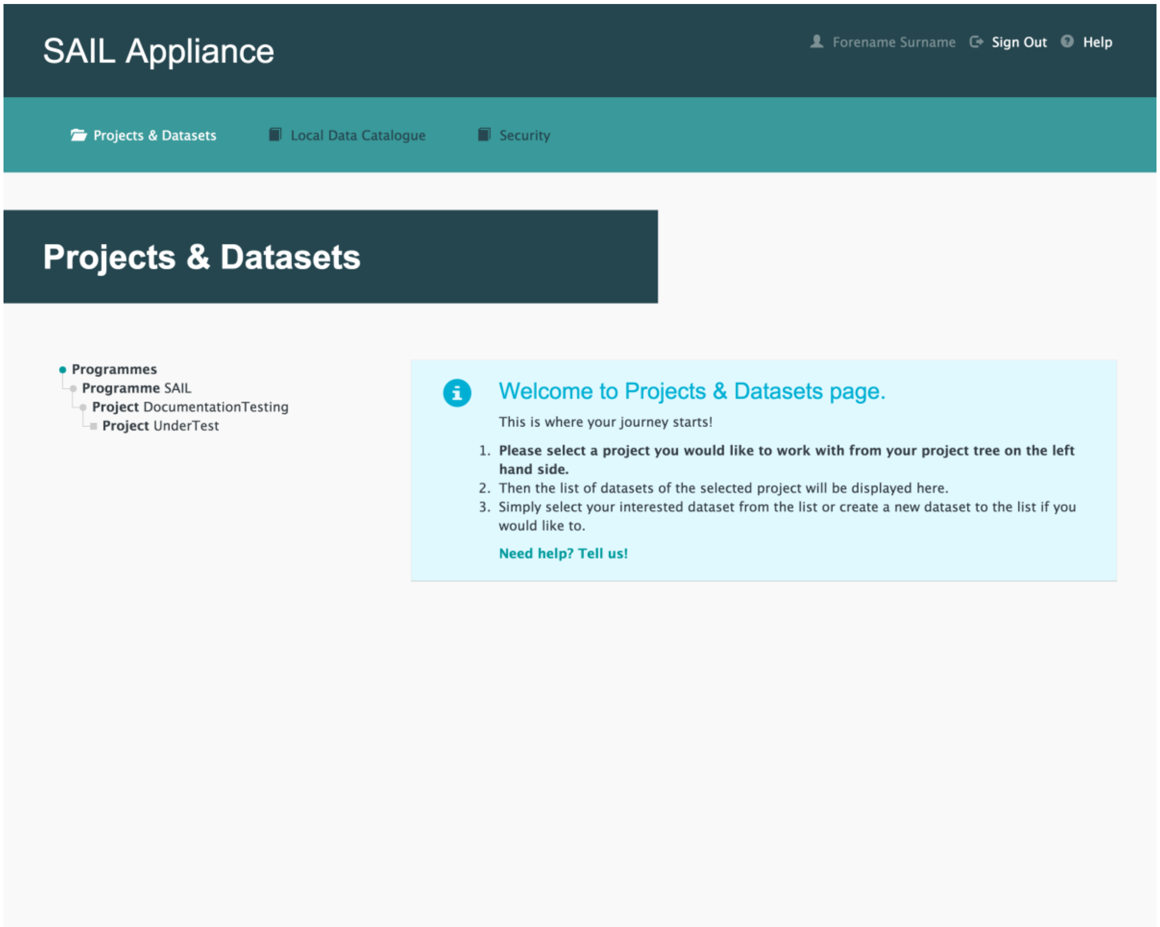
Left-hand navigation menu showing available Projects

5. Click into the Permissions section and the Capabilities section to see the details for the selected Project. For more information, see Permissions and Capabilities

How to change a Project's Settings

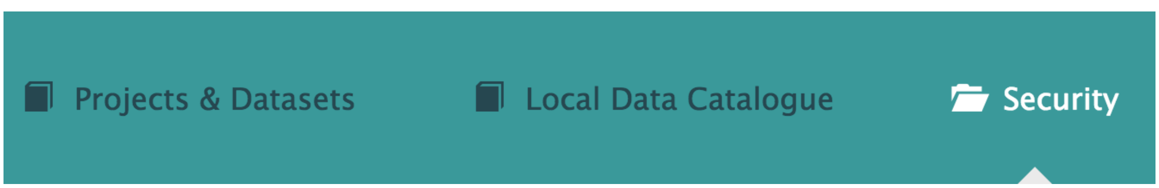
The following steps show how to view and adjust a Project's Settings.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

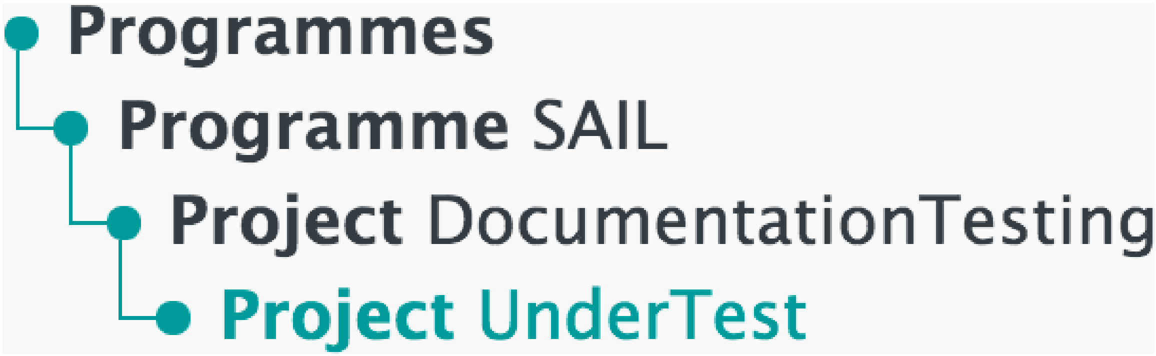


Security menu item

3. Click Projects (should be selected by default)

Projects menu item

4. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

5. Click the Settings section to see the details for the selected Project. For more information, see Settings

User tasks

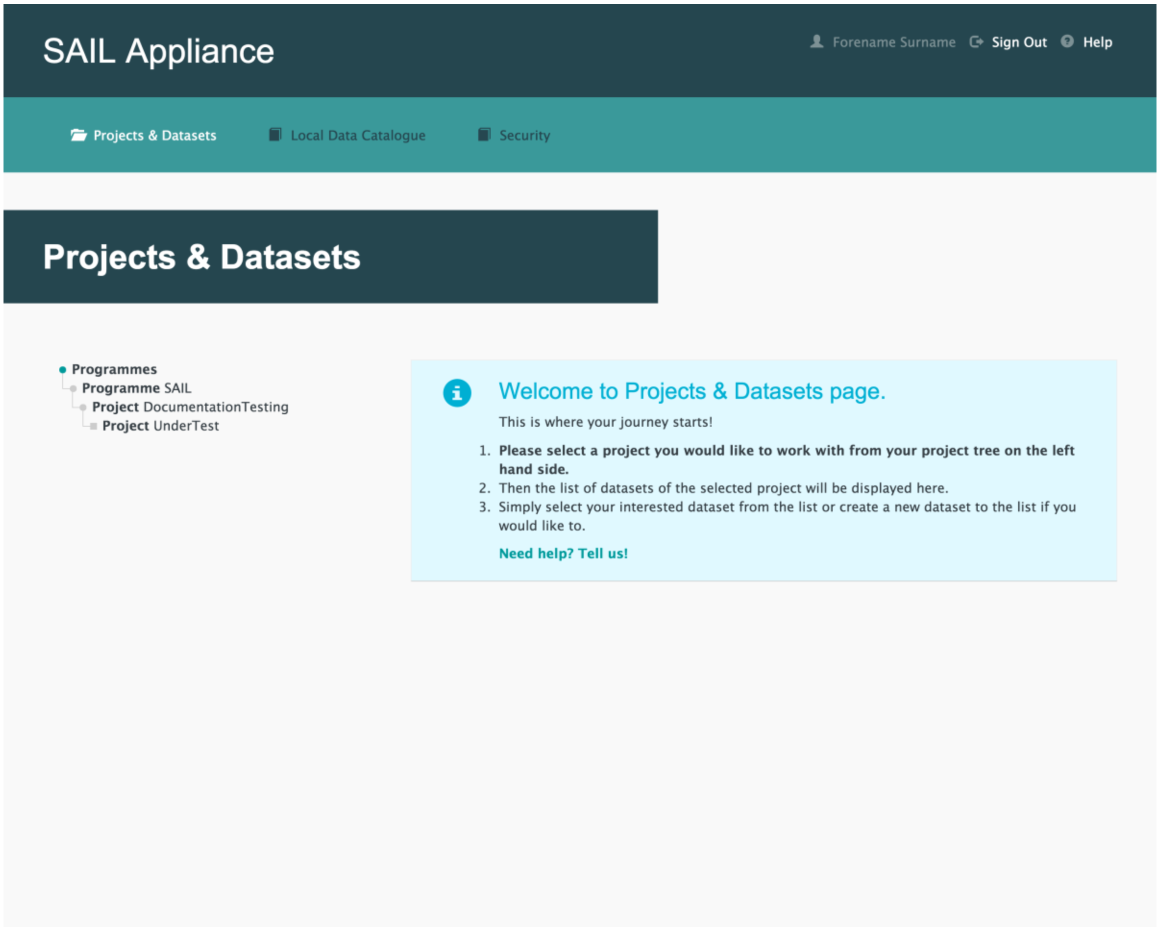
- How to create an account – creating a user account via the Security page
- How to amend user accounts – editing existing user accounts via the Security page
- How to review a user's effective permissions – reviewing effective permissions via the Security page
- How to assign a Role to a user – assigning a Role to a user via the Security page

How to create an account

The following steps show how to create a user account.

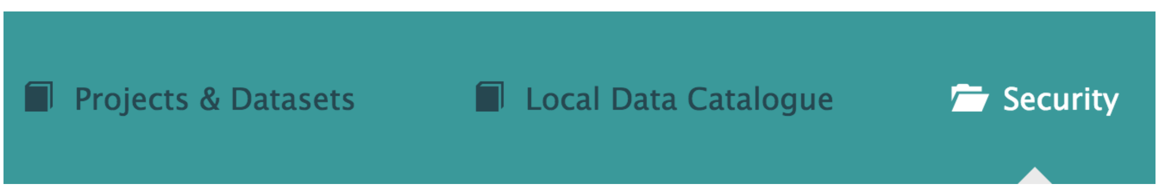
Only administrators are able to create new accounts in the RDA.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

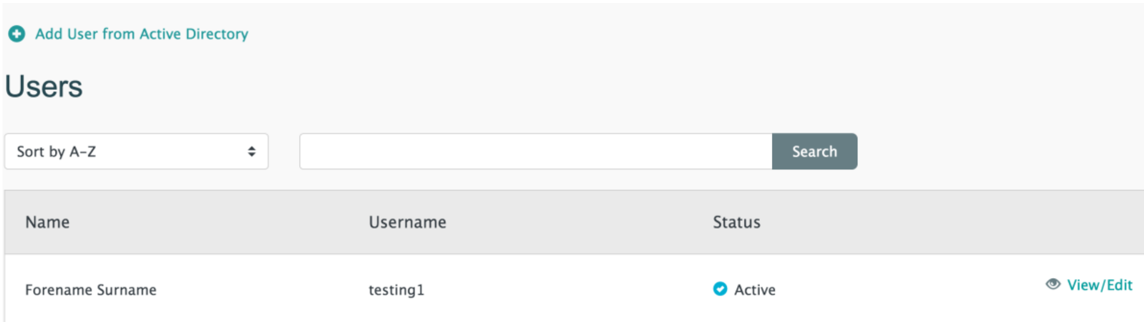


Security menu item

3. Click Users

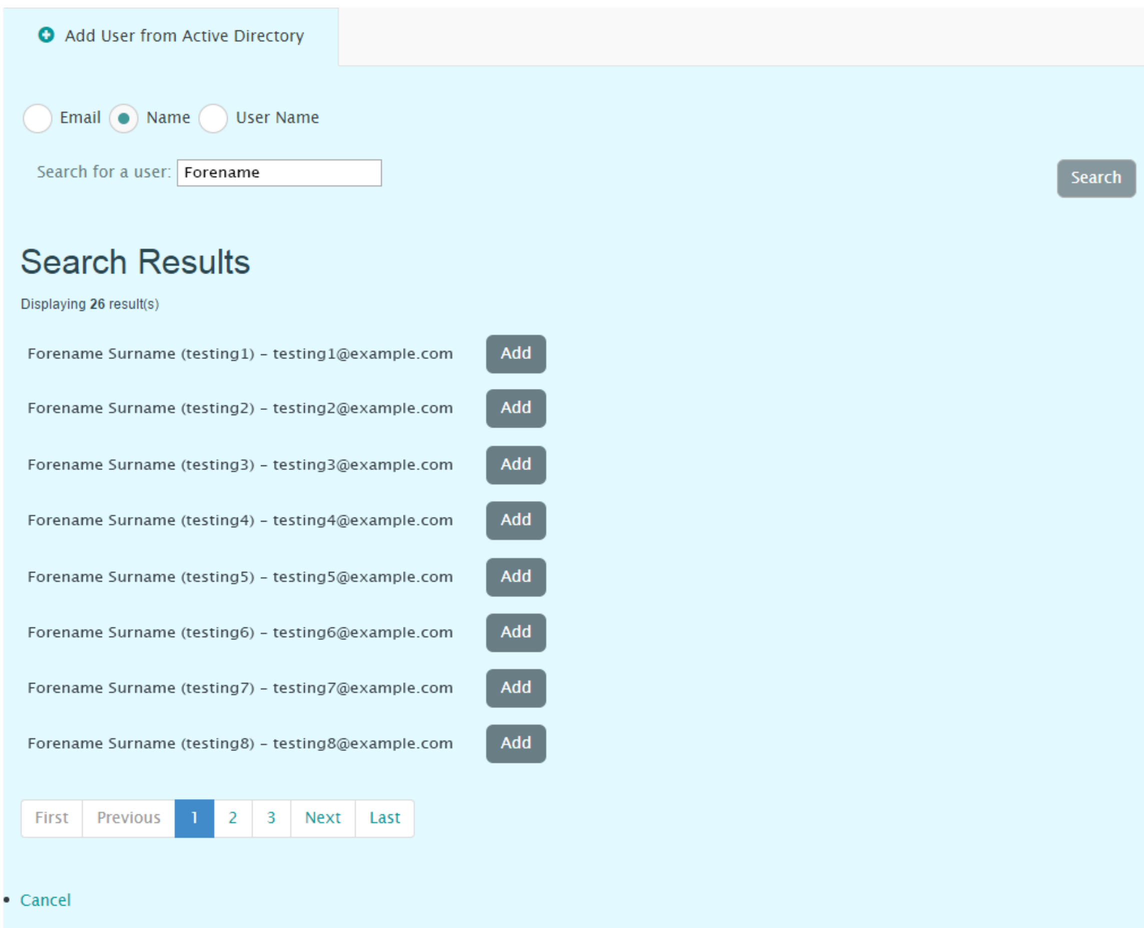
Users menu item

4. Click Add User from Active Directory



Click Add User from Active Directory

5. Search for the user, using Email, Name or User Name filtering



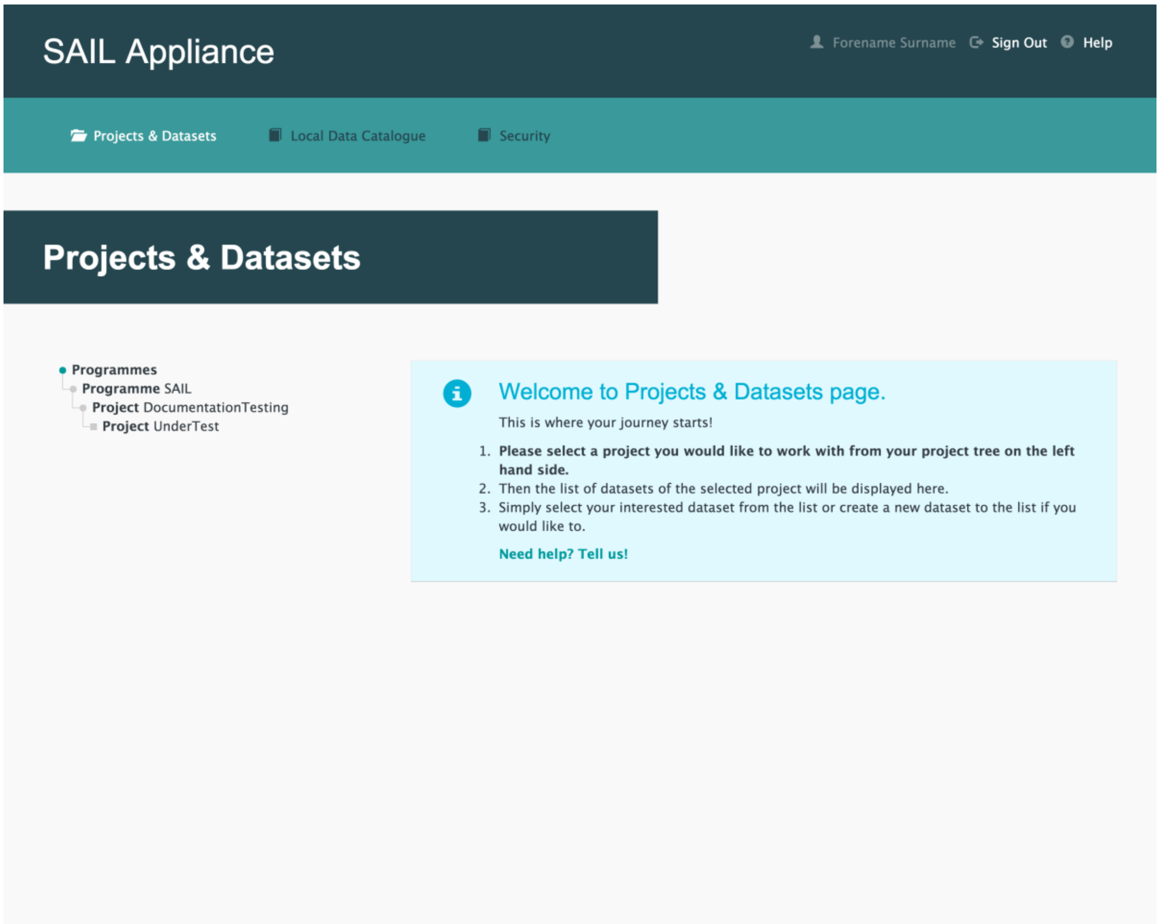
Search for users, then click Add

6. Click Add

How to amend user accounts

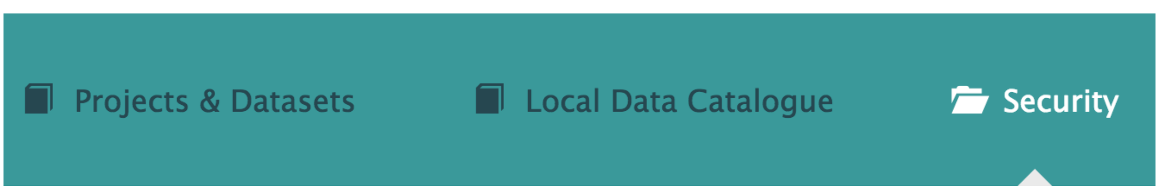
The following steps show how to view and edit an existing user account.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security



Security menu item

3. Click Users

Users menu item

The default view of the Users page is shown below:

Default view of Users page

Definitions

Sort by A–Z

Adjust sorting of the list of accounts

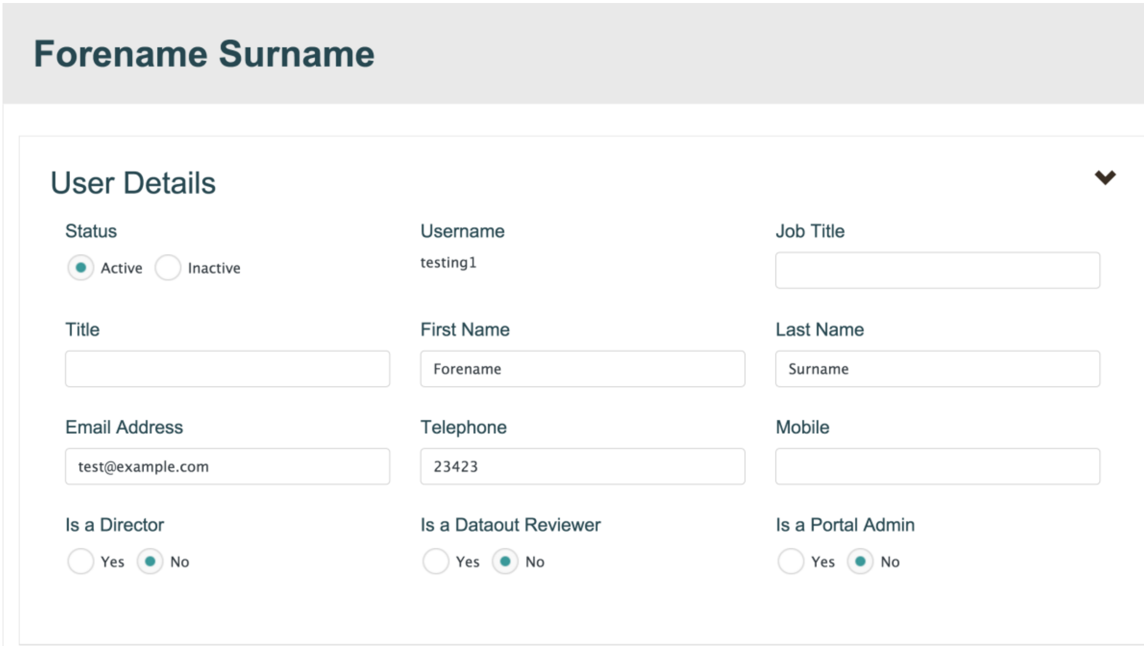
Search

Filter results by the search criteria

View/Edit

View and edit details of the selected account

4. Click View/Edit next to the user account to be edited
5. Click Edit
6. Edit the details in each of the sections as appropriate (for more information, see Users)



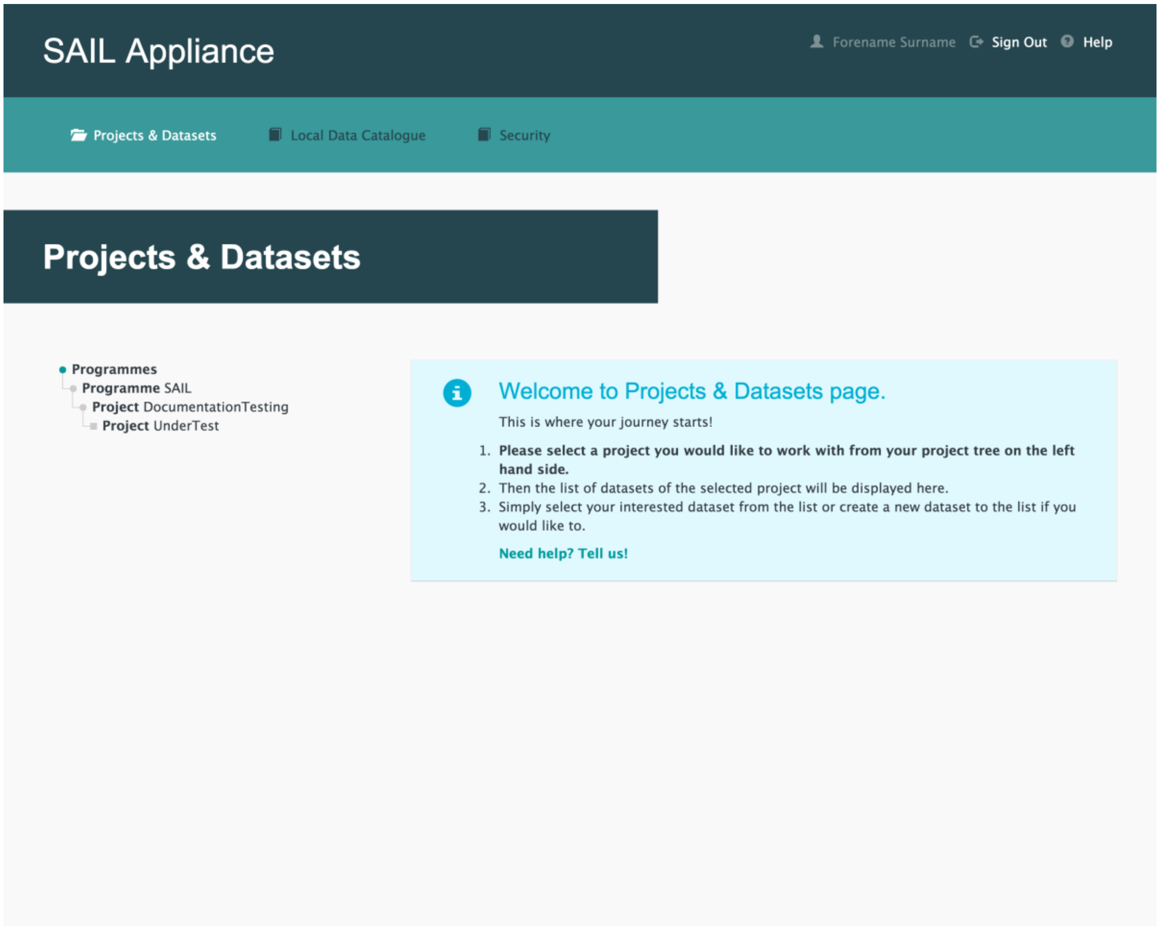
User Details section

7. Click Save to update the user account

How to review a user's effective permissions

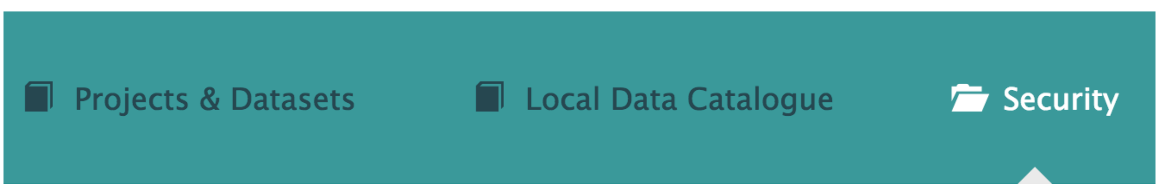
The following steps show how to view a user's effective permissions.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security



Security menu item

3. Click Users

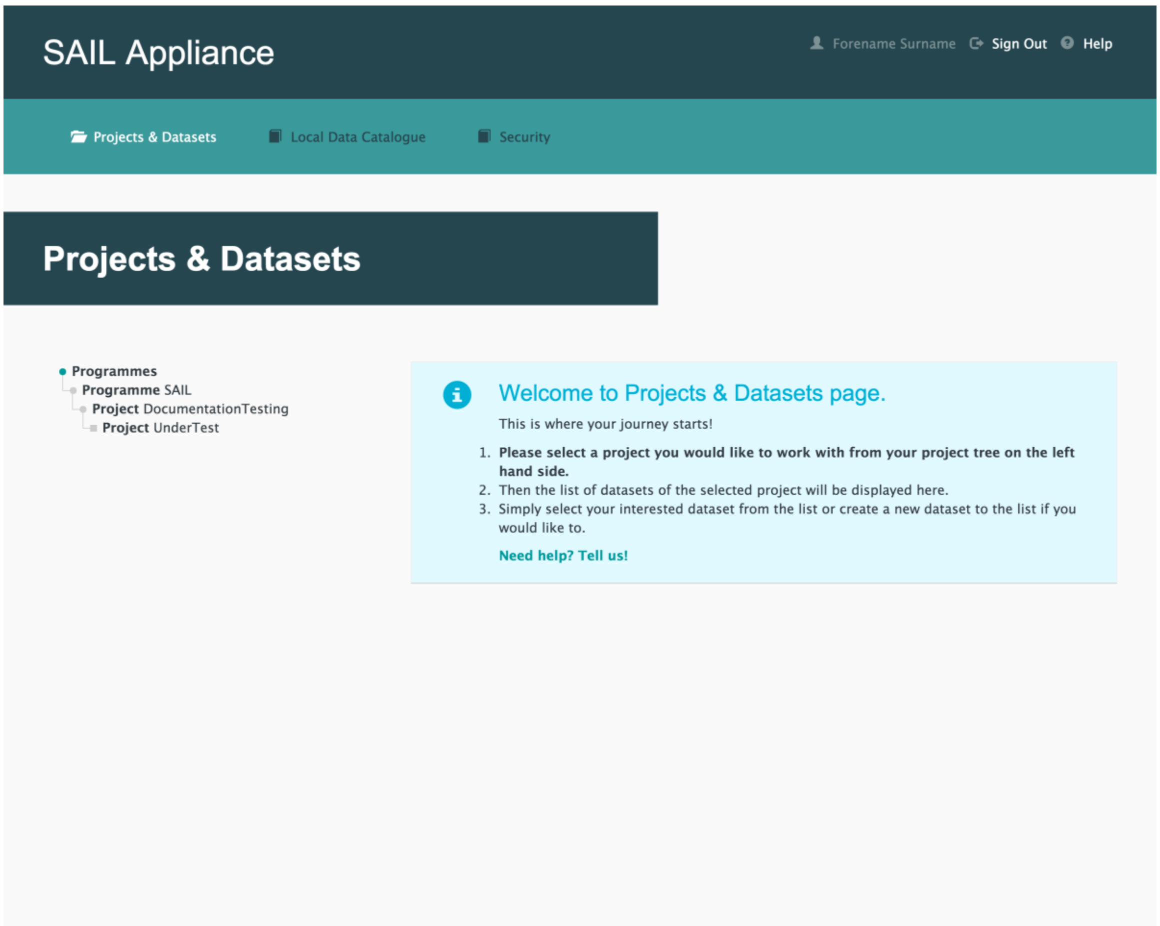
Users menu item

4. Click the Effective Permissions section to view the details for the selected user. For more information, see Effective Permissions

How to assign a Role to a user

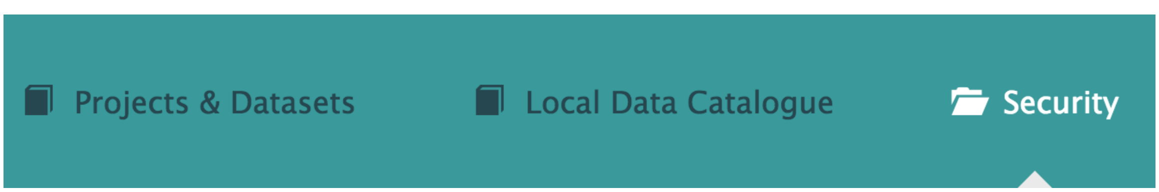
The following steps show how to assign a Role to a user.

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

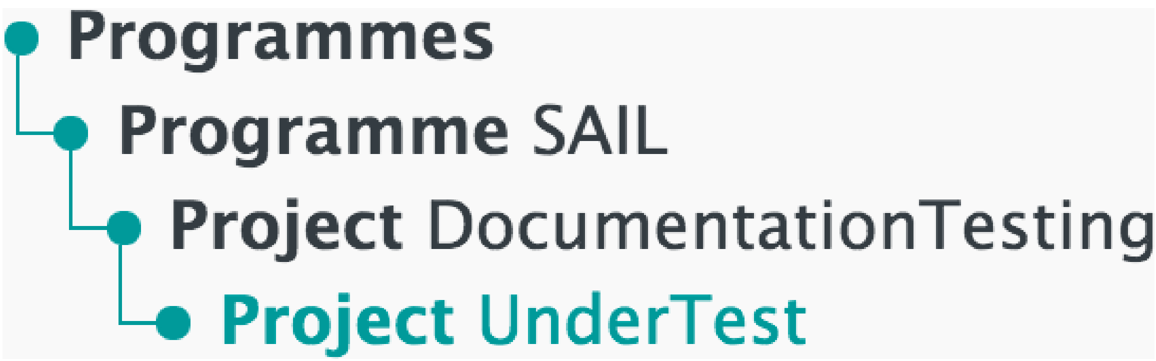


Security menu item

3. Click Projects (should be selected by default)

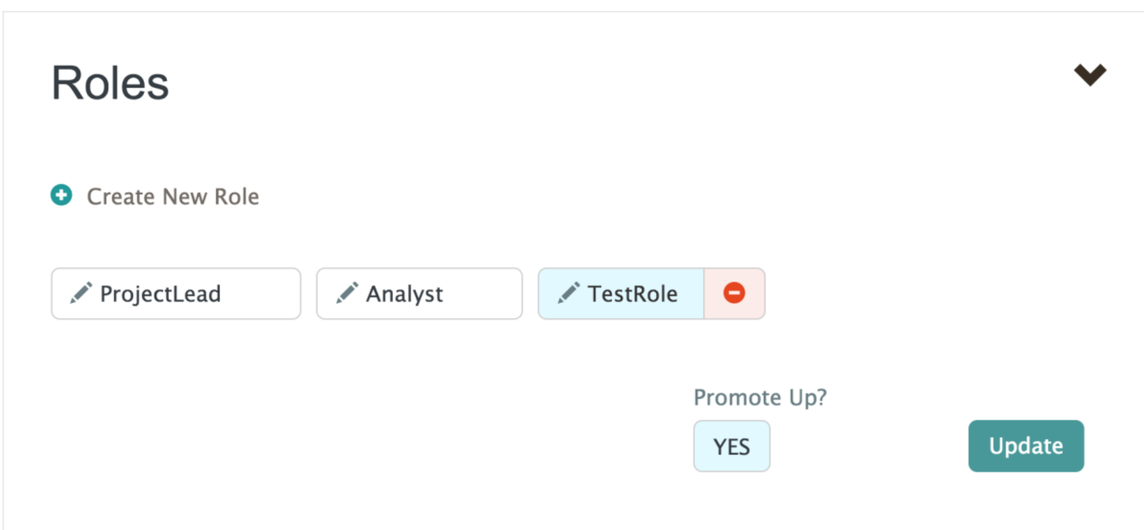
Projects menu item

4. Select a Project from the left-hand navigation menu



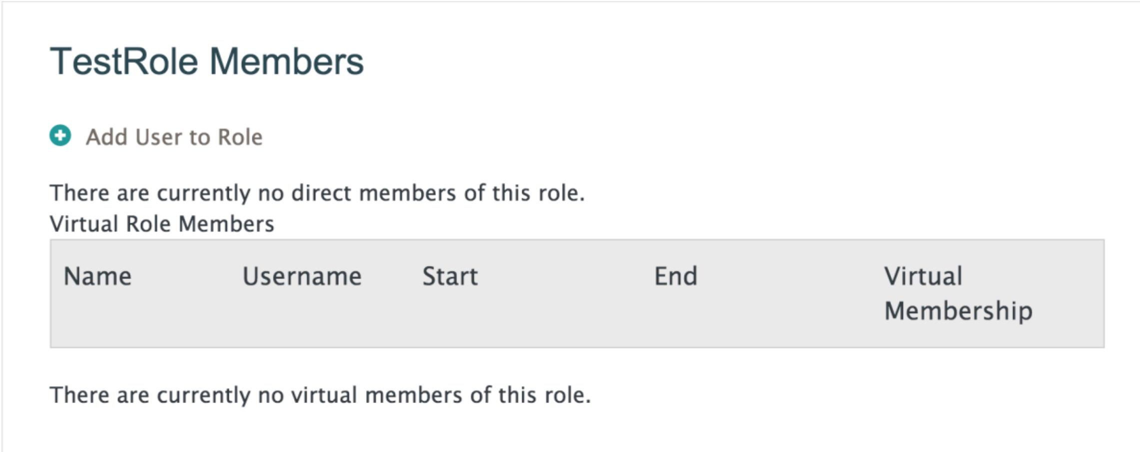
Left-hand navigation menu showing available Projects

5. Click the **Roles** section
6. Click the Role you wish to assign to the user. To create a Role, see [How to create or edit Roles]



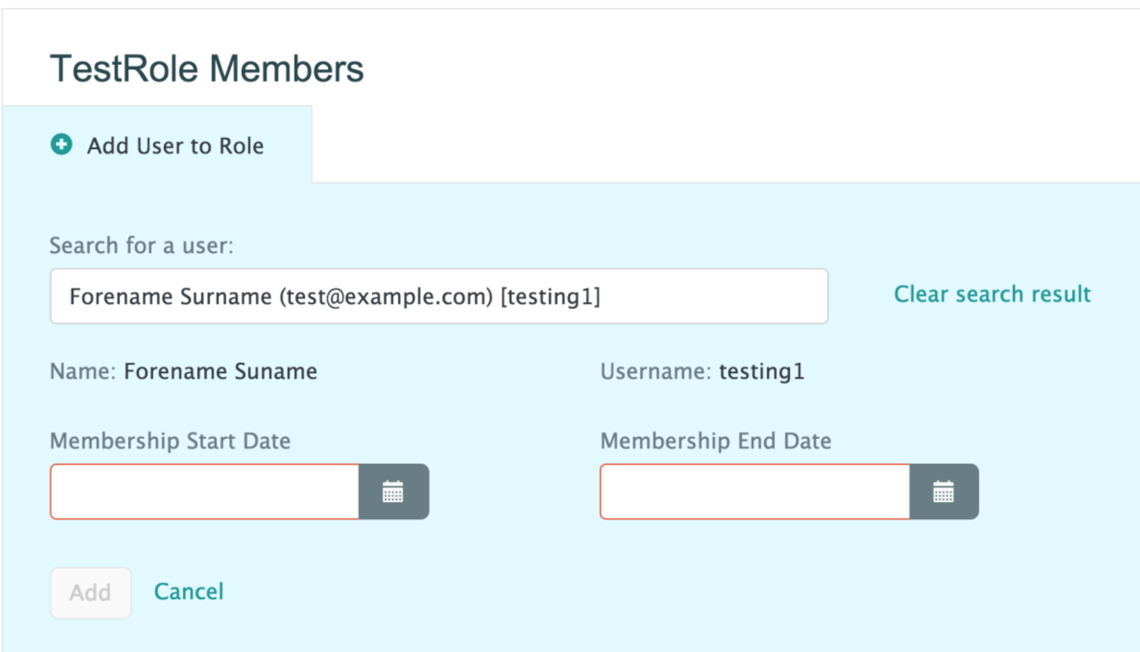
Select a Role

7. In the Members section, click Add User to Role



Click Add User to Role

8. Use the search field to find the user. To create a user account, see [How to create an account]
9. Set a start and end date for membership of the Role
10. Click Add



Select the user account to add to the Role

Data tasks

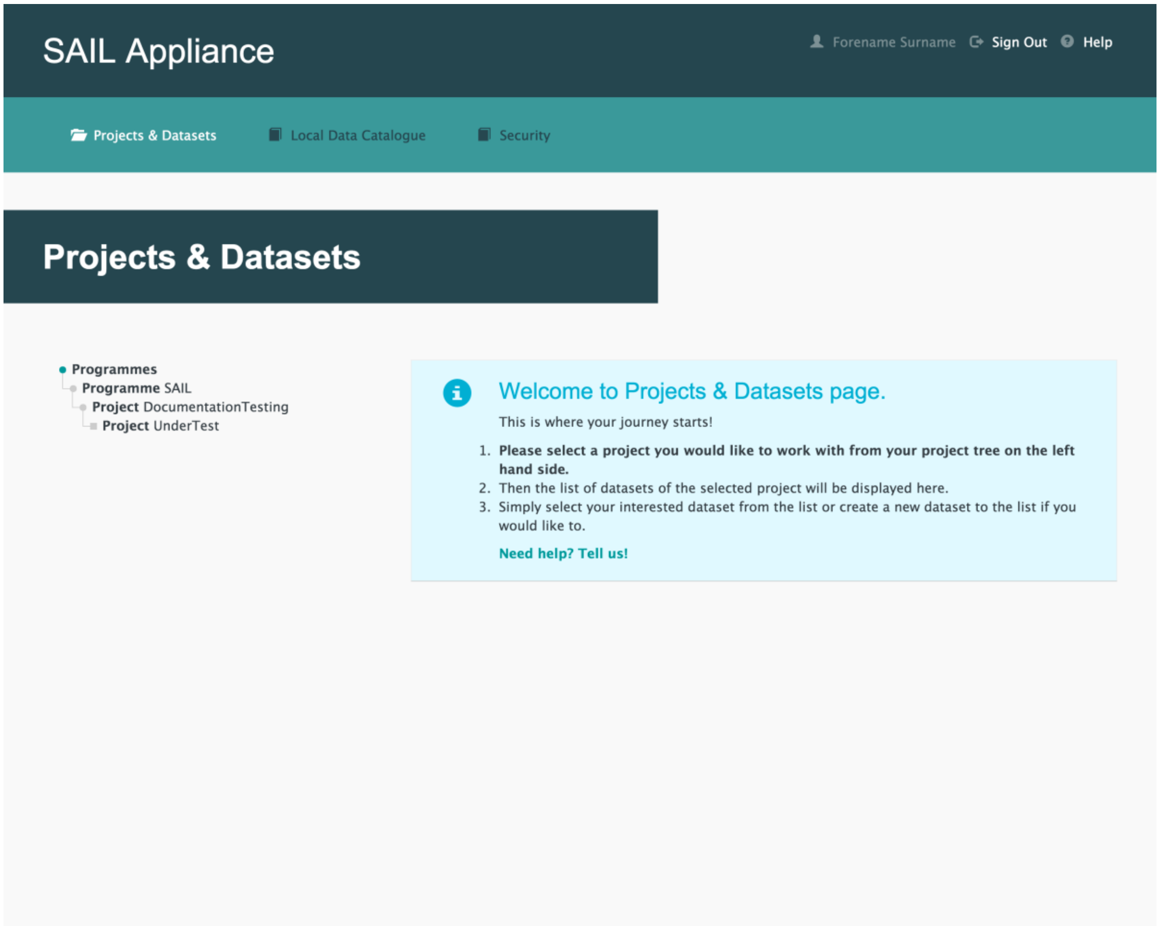
- [How to create a Dataset] – creating a Dataset

- How to upload data – uploading data to a Dataset
- How to search for a Dataset – finding and viewing the right Dataset
- How to amend a Dataset – amending a Dataset by creating a new version
- How to check Data Import Settings – checking and adjusting settings after uploading data to a Dataset
- How to check Data Details – checking and adjusting settings after uploading data to a Dataset
- How to create a Share Profile – creating a Share Profile
- How to upload a supporting file – adding a supporting file to provide more information about the main data in the Dataset
- How to check Dataset status – viewing the status of each Project
- How to access the Data Quality Report – viewing the Data Quality Report

How to create a Dataset

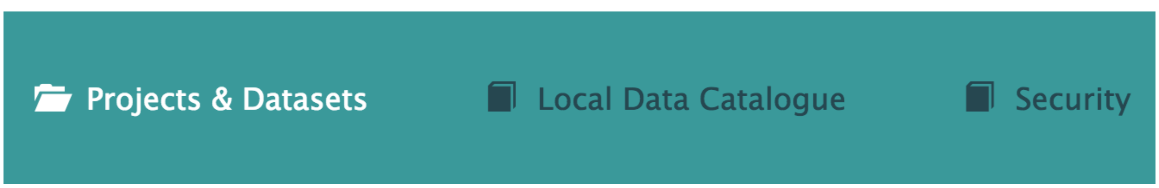
The following steps show how to create a Dataset.

1. Log in to the RDA



Default view of RDA user interface

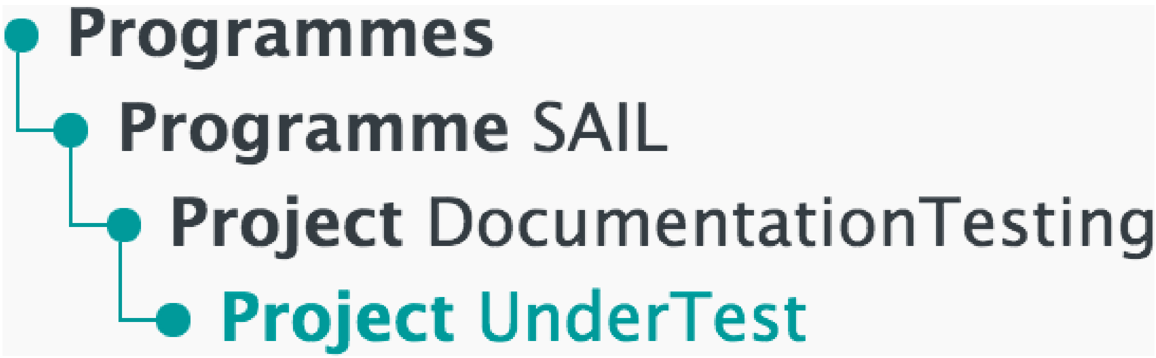
2. Click Projects & Datasets



Projects & Datasets menu item

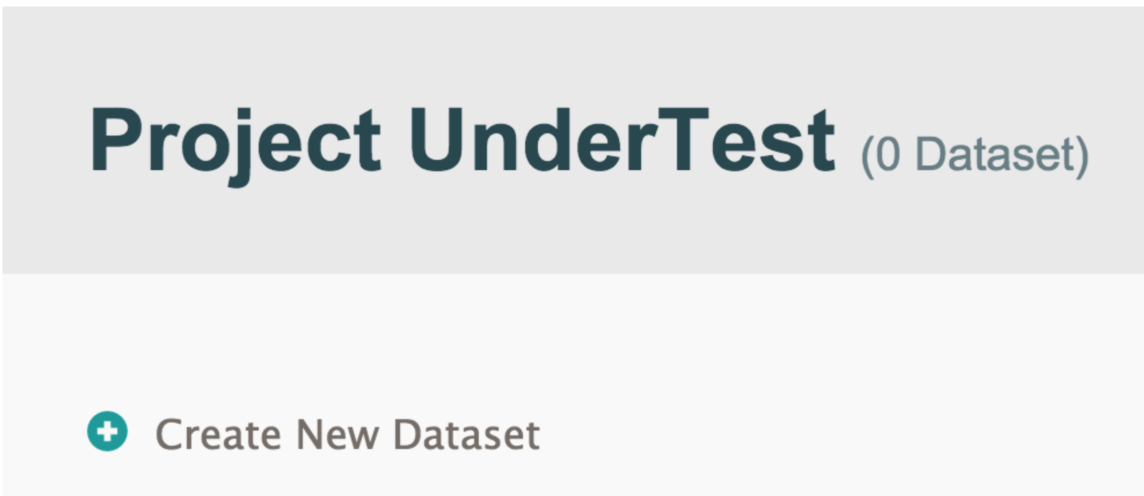
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation list



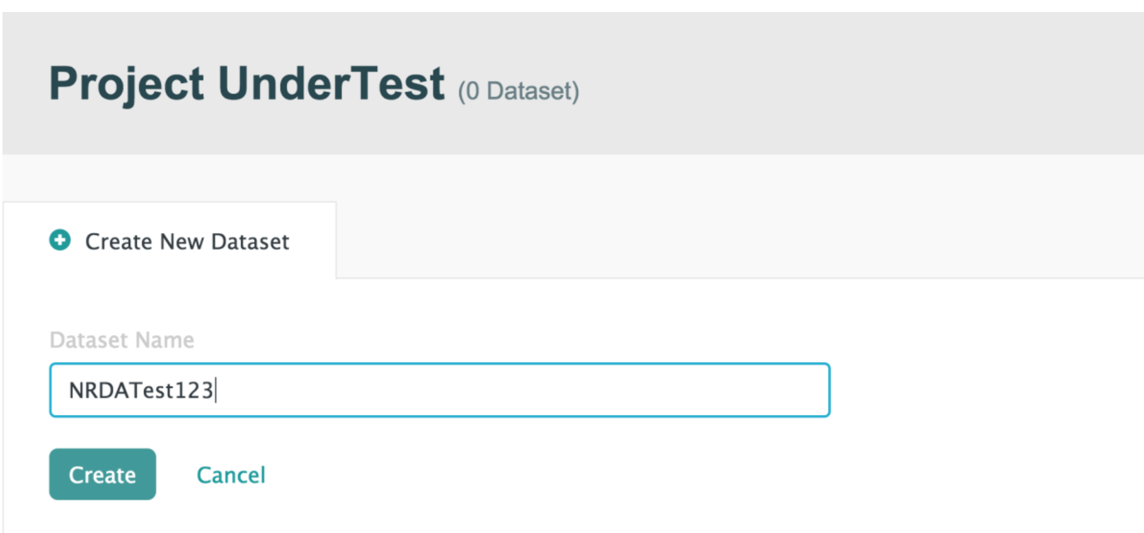
Left-hand navigation menu showing available Projects

4. Click Create New Dataset



Project selected with no Datasets

5. Enter a name for the Dataset, and then click Create

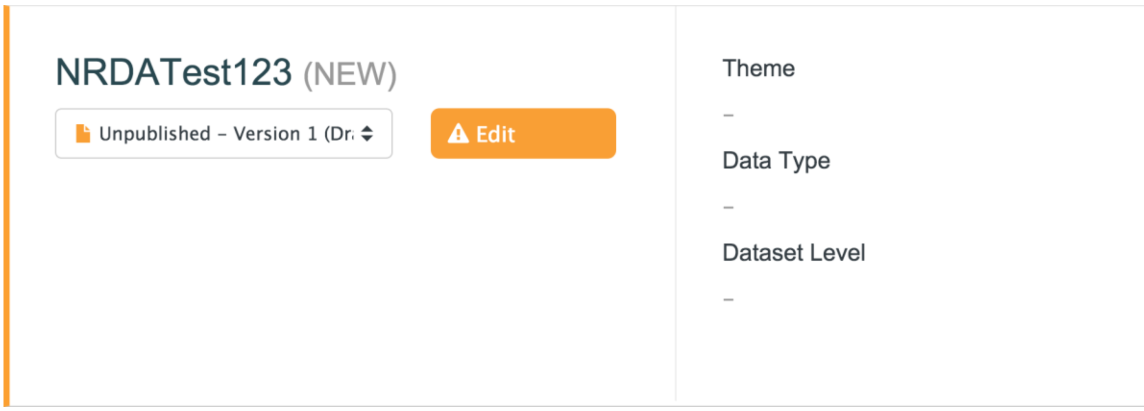


Creating a new Dataset

After creating a Dataset, refresh the page to see it.

A new Dataset appears with the default state as Unpublished – Version 1.

6. Click Edit to upload data and adjust the details of the new Dataset



New Unpublished Dataset

For more information on editing a Dataset, see the reference pages below:

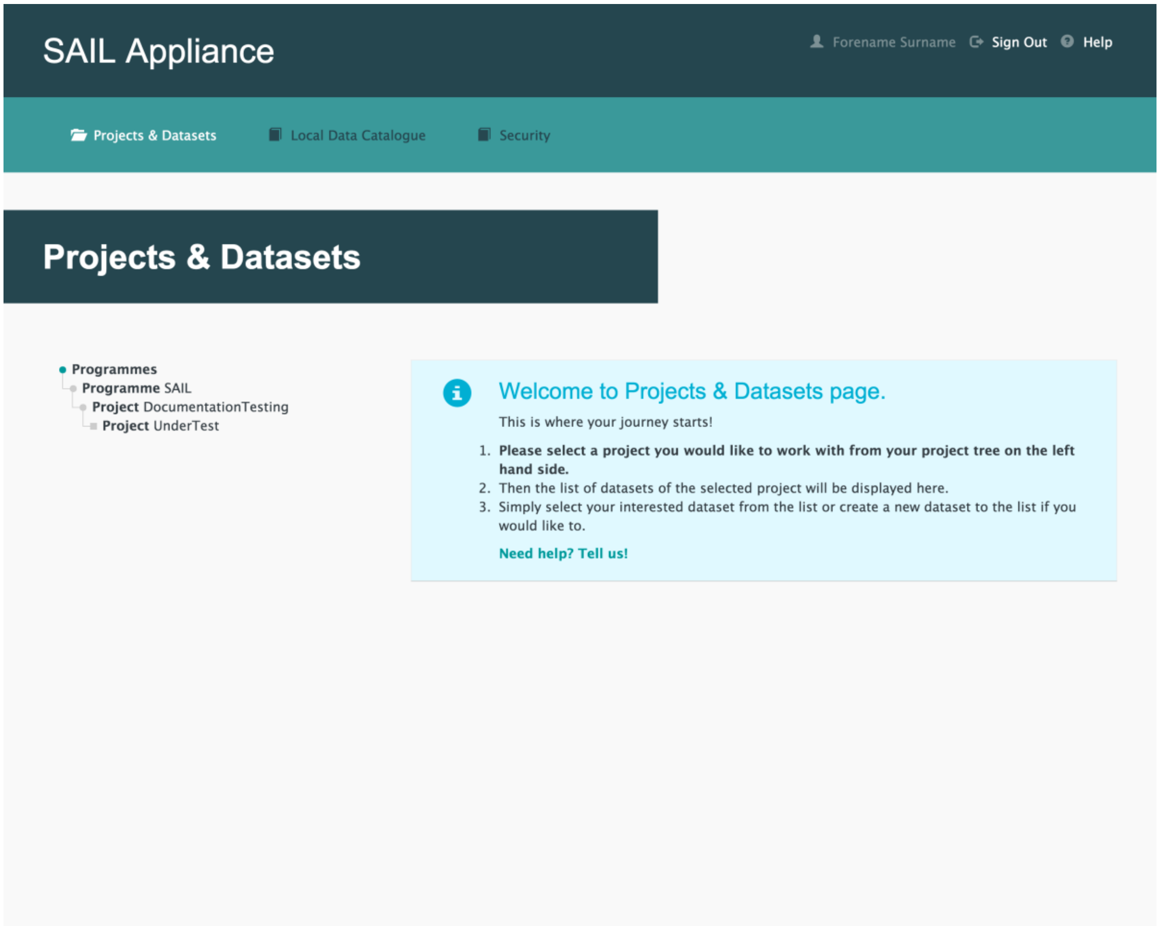
- Dataset Description
- Data Files
- Supporting Files
- Entity Relationship Diagram
- Share Settings
- Pre-Publish

How to upload data

The following steps show how to upload a data file to an existing Dataset.

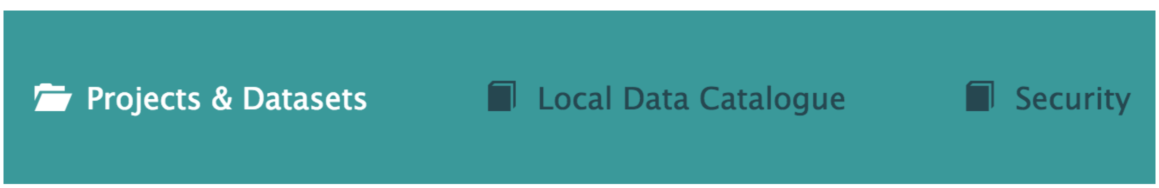
Data must be added to a Dataset before the Dataset is published in the Local Data Catalogue. For information on creating a Dataset, see How to create a Dataset.

1. Log in to the RDA



Default view of RDA user interface

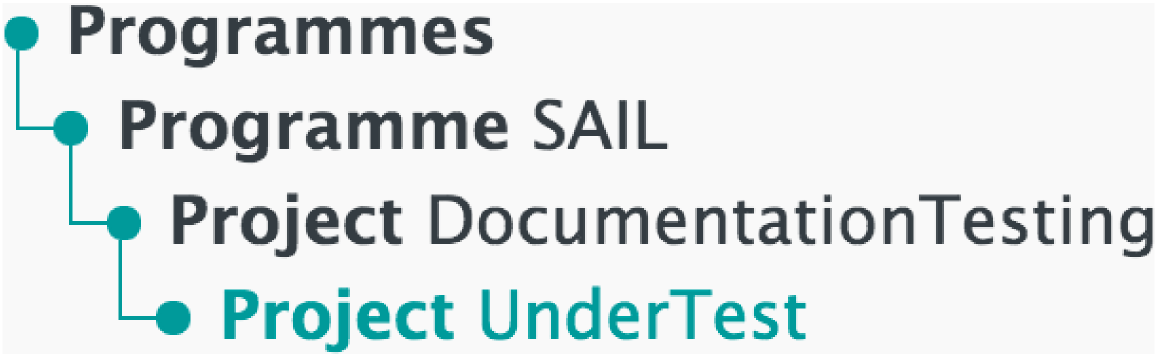
2. Click Projects & Datasets



Projects & Datasets menu item

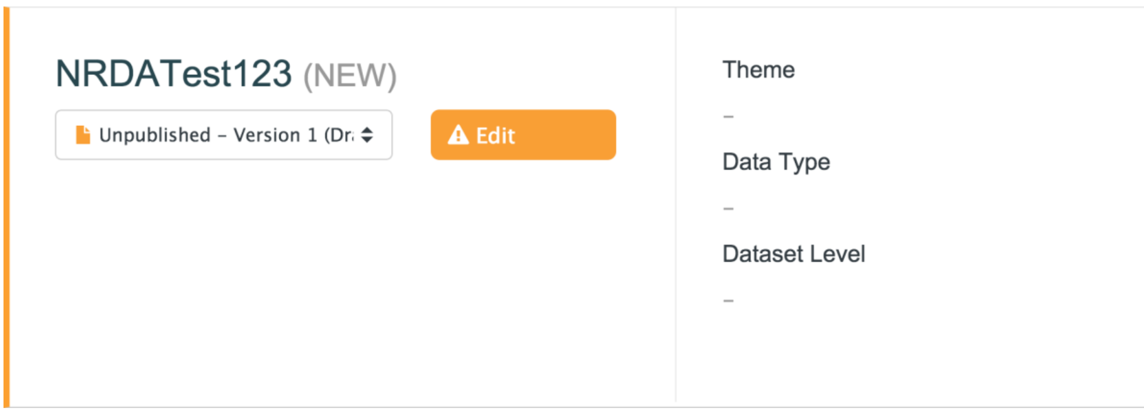
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit

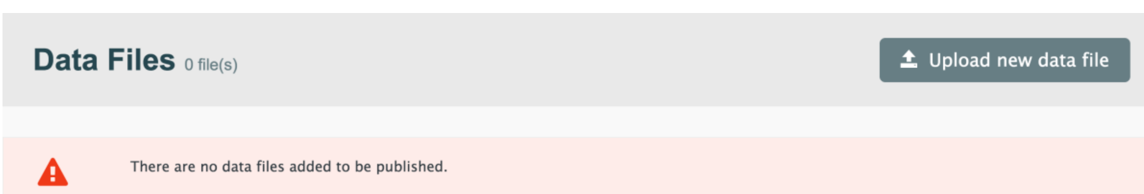


Sample unpublished Dataset

5. Click Data Files

Data Files menu item

6. Click Upload new data file

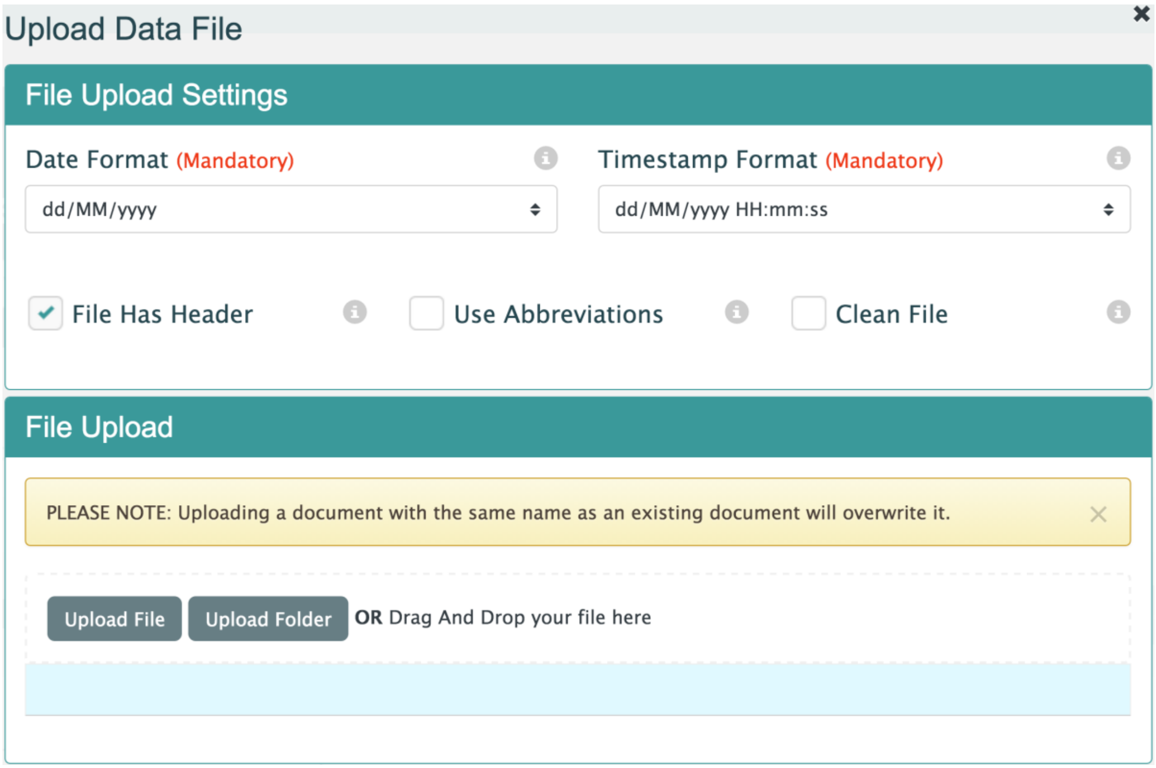


Default view of Data Files page with no data added

> A Dataset cannot be published until all mandatory fields on the Data Files page have been completed. See [Pre-Publish](#) for more information.

The Upload Data File panel appears and prompts the user to upload a file or folder.

7. Select the relevant options from the File Upload Settings panel
8. Click Upload File or Upload Folder to upload the relevant content

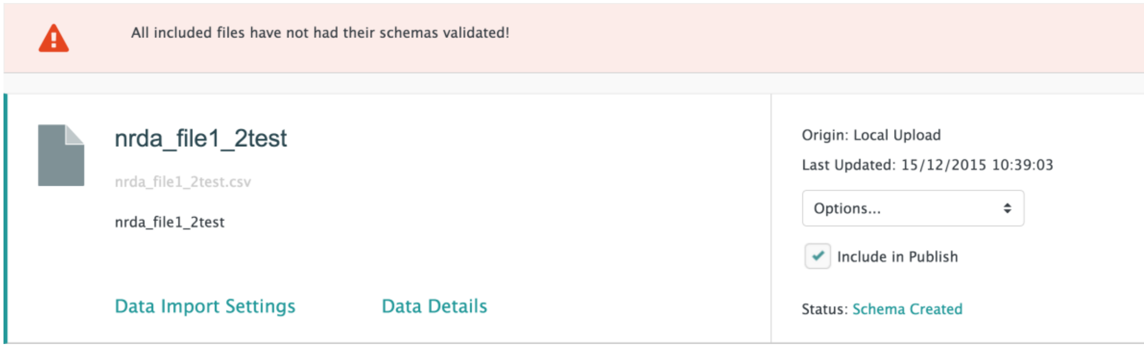


The file must follow a set of formatting requirements. Click below for more information.

Formatting requirements

- All dates or timestamps within a column should be in the same format
- If character type columns have commas or other delimiter type characters within text, then the character type column should have text data within it enclosed in quotes
- It is recommended that the number of columns in source data file / tables be less than 500
- Eligible data sources include CSV files
- It is recommended that string (character, varchar, text) type data columns should be enclosed in quotes
- If strings that are quoted have same quote within the data elements, then the quote within data element needs to be escaped with a backslash e.g. 'Simon Mc'Freddie' becomes 'Simon Mc\'Freddie'

After uploading a file or folder, the following panel is displayed:



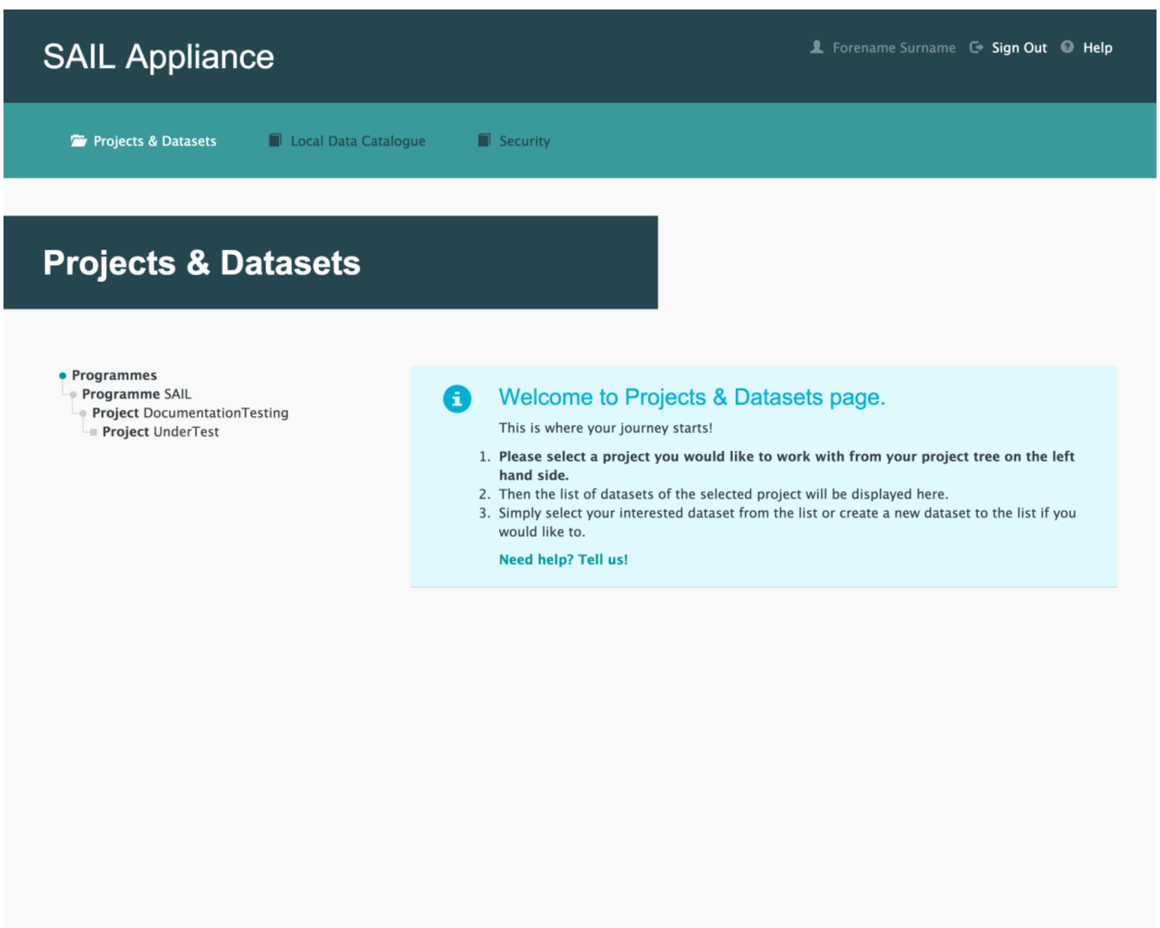
To adjust further settings related to the uploaded data, see the following tasks:

- [How to check Data Import Settings]
- [How to check Data Details]

How to search for a Dataset

The following steps show how to search for a Dataset.

1. Log in to the RDA

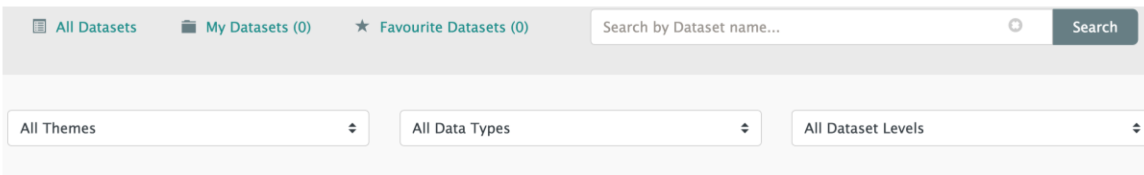


Default view of RDA user interface

2. Click Local Data Catalogue

Local Data Catalogue menu item

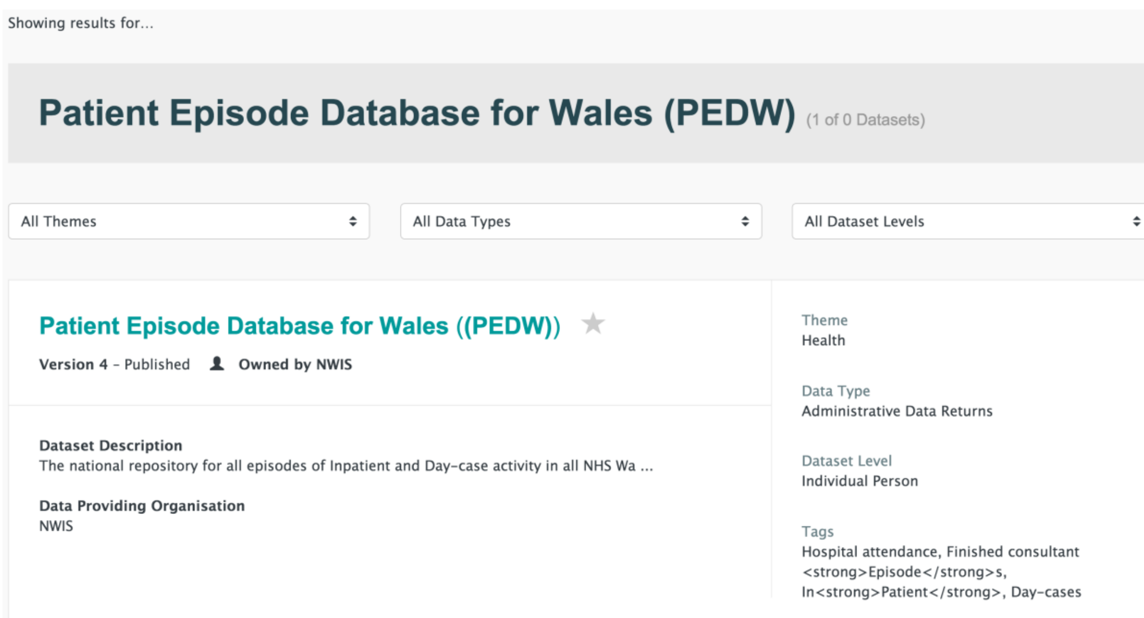
Near the top of the page, a search field and search filters are displayed.



Search field and filters

3. Enter the search criteria and click Search, or select a dropdown filter to reduce the number of results

An example of the search results is shown below:



Search results

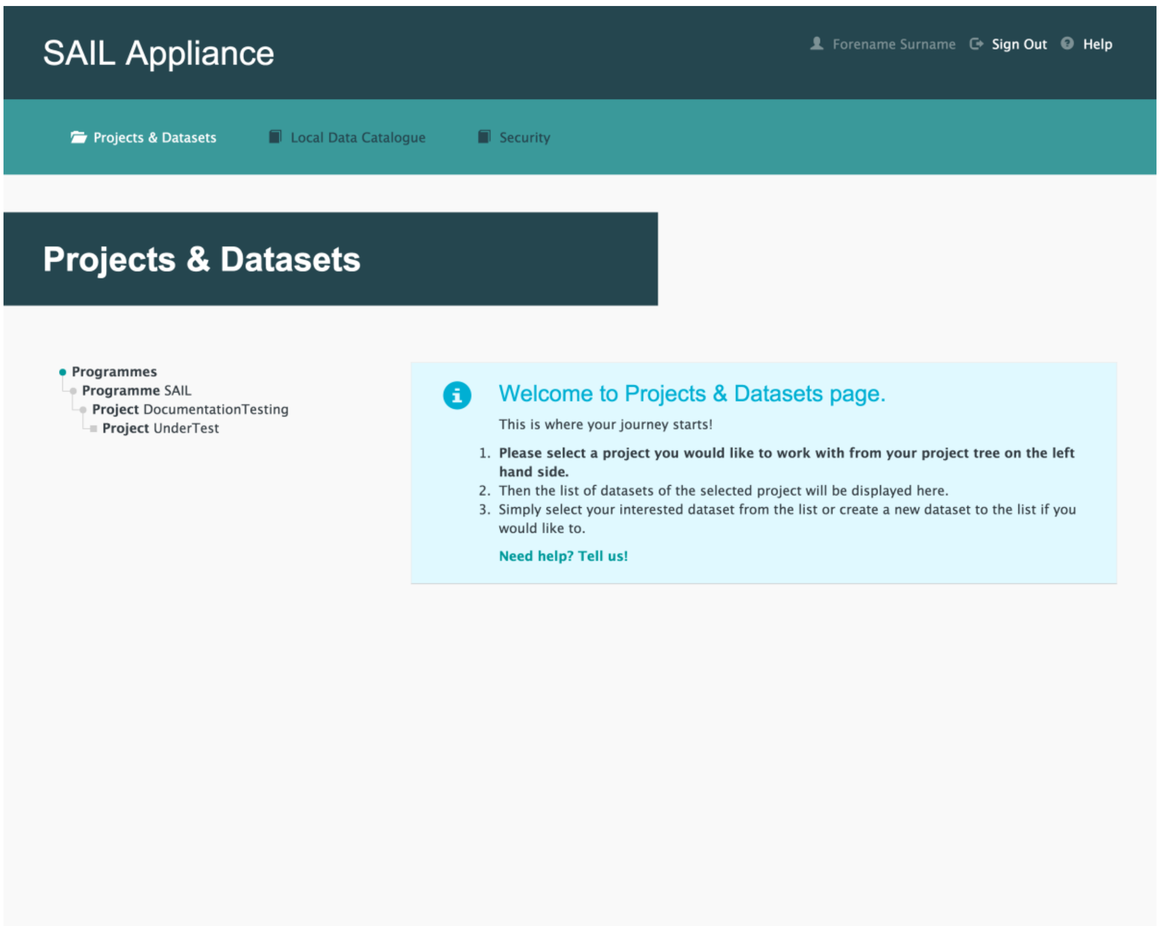
4. Click the hyperlinked title of each search result to view the published content. For more information, see [Local Data Catalogue]

How to amend a Dataset

The following steps show how to amend a published Dataset.

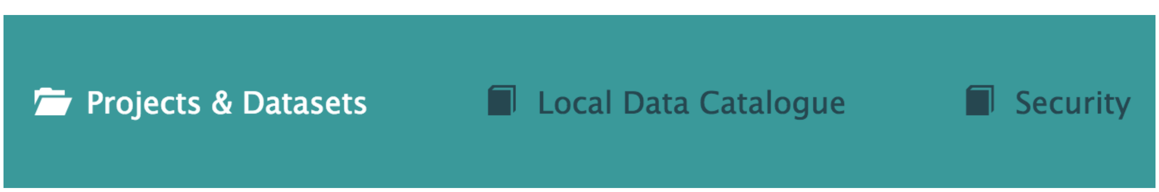
A Dataset cannot be directly amended after it has been published. However, a new *version* of a published Dataset *can* be amended.

1. Log in to the RDA



Default view of RDA user interface

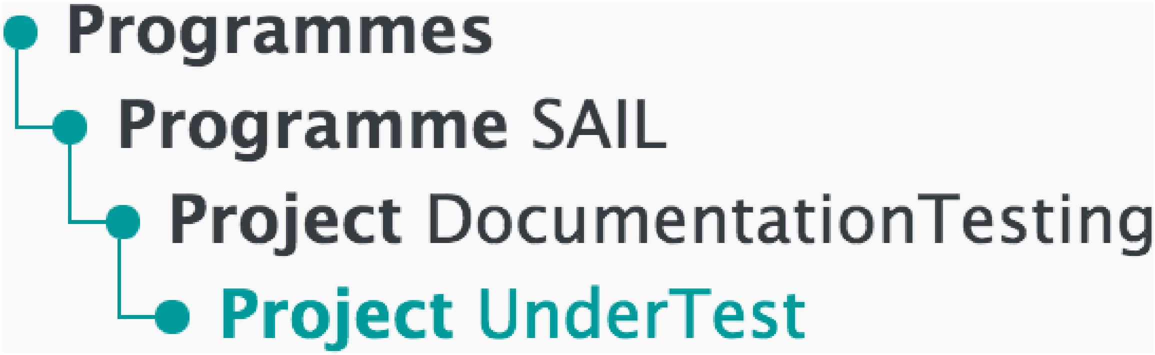
2. Click Projects & Datasets



Projects & Datasets menu item

The Projects & Datasets section is selected by default.

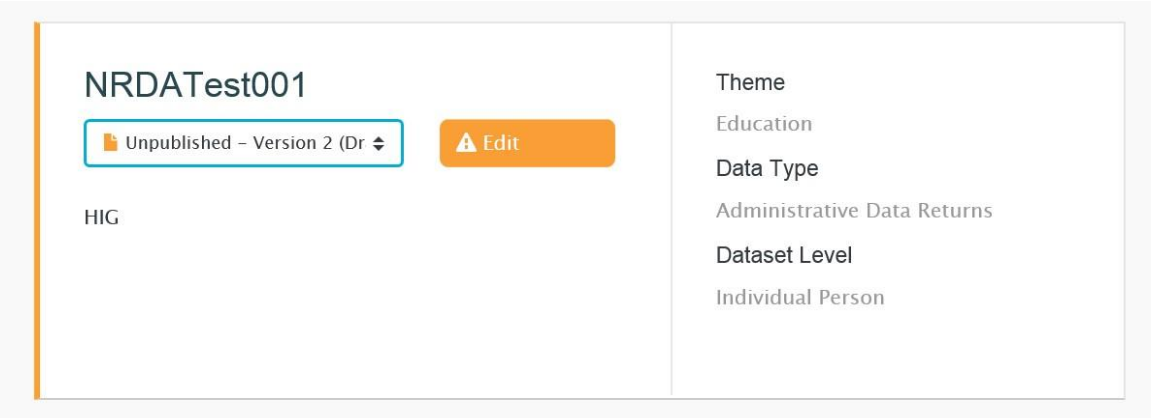
3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

All Datasets in the Project are displayed.

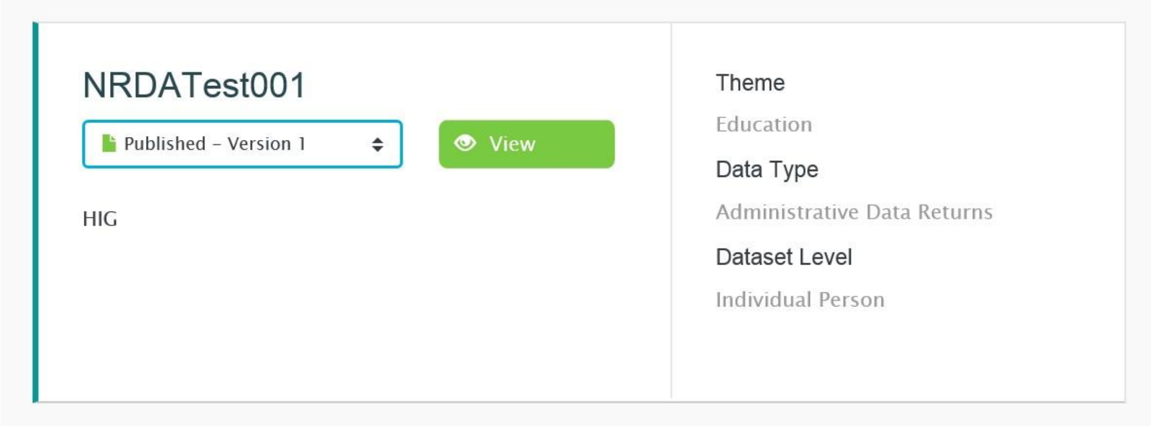
Unpublished Datasets look like the example shown below:



Unpublished Dataset

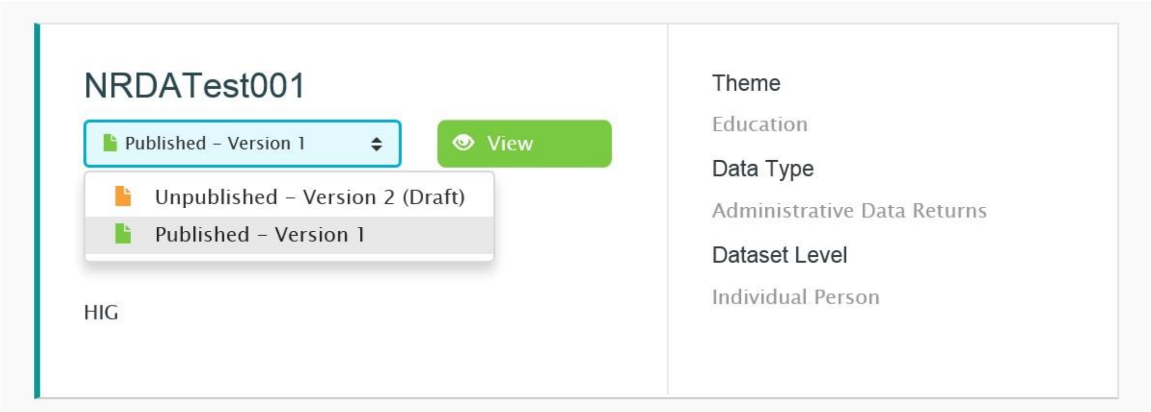
An unpublished Dataset can be amended by clicking the Edit button.

Published Datasets look like the example shown below:



Published Dataset

Published Datasets cannot be amended directly, but clicking the dropdown menu of the published version number allows the selection of a new unpublished version, as shown below:



Published Dataset

Once this unpublished version has been selected, the Edit button can be used to amend the Dataset.

For more information on editing a Dataset, see the reference pages below:

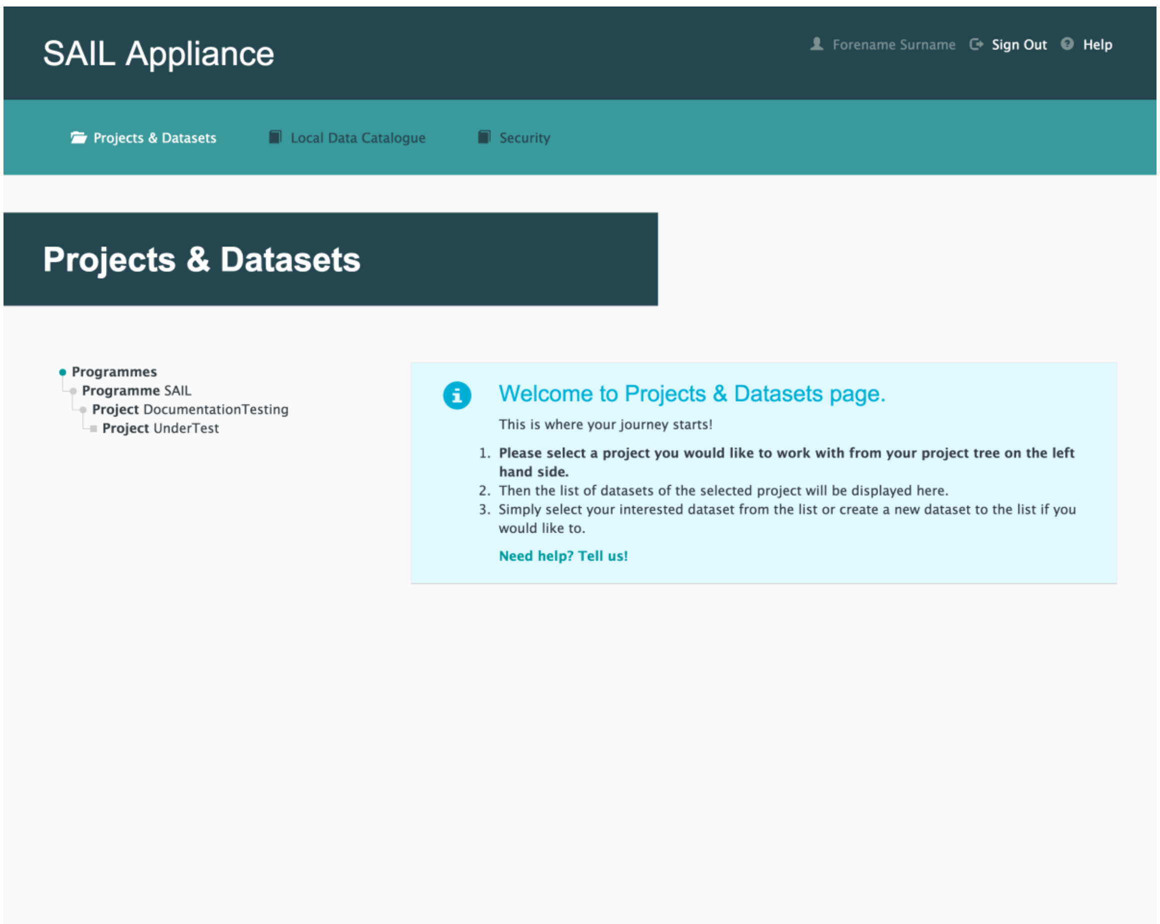
- Dataset Description
- Data Files
- Supporting Files
- Entity Relationship Diagram
- Share Settings
- Pre-Publish

How to check Data Import Settings

The following steps show how to check the details of data that have been uploaded to a Dataset.

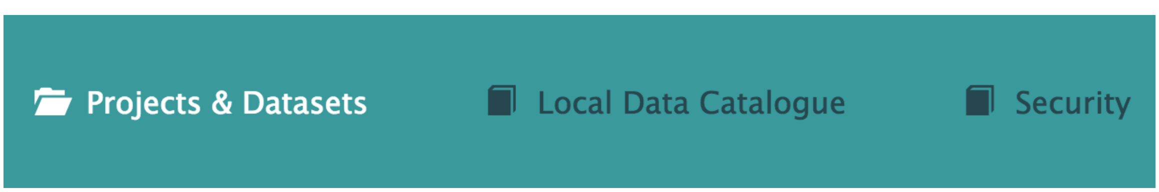
The Data Import Settings panel is used to view and edit settings for data uploaded via the Data Files page. The settings in the Data Import Settings panel should be checked before the Dataset is published.

1. Log in to the RDA



Default view of RDA user interface

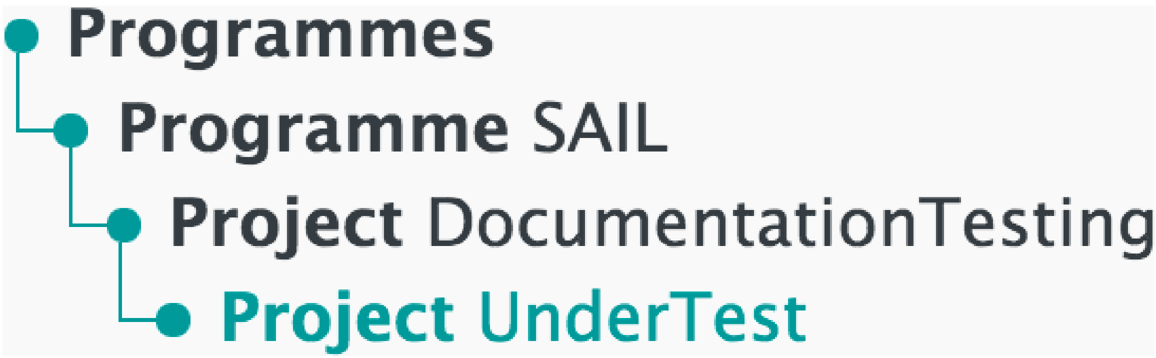
2. Click Projects & Datasets



Projects & Datasets menu item

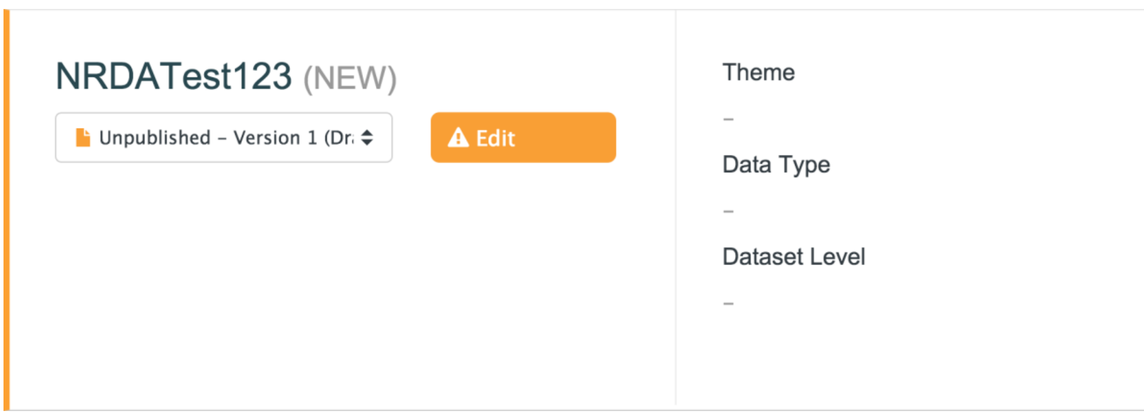
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit

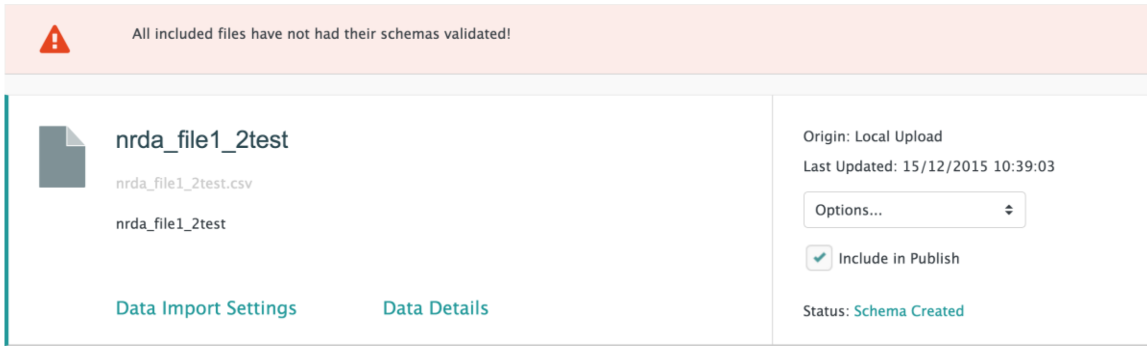


Sample unpublished Dataset

5. Click Data Files

Data Files menu item

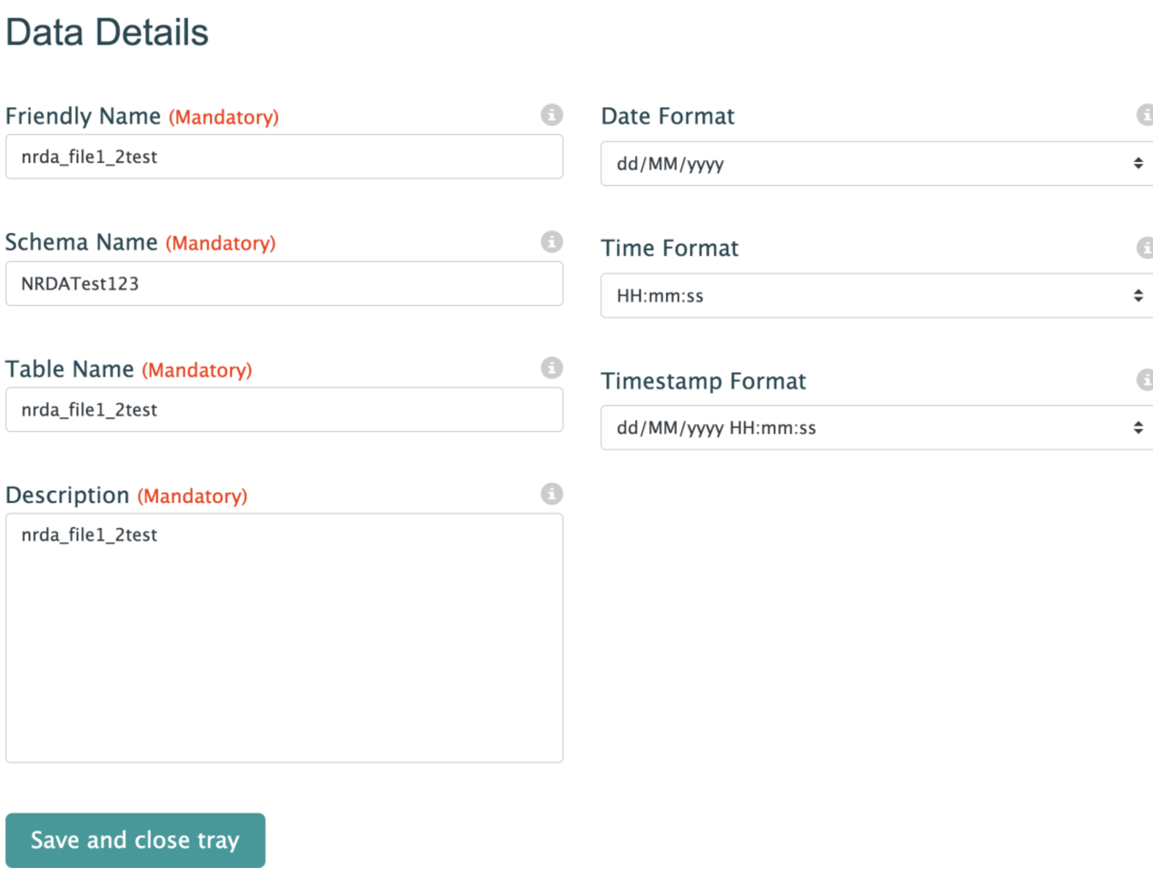
6. Click Data Import Settings



Sample data file upload

The Data Import Settings panel is displayed.

7. Edit the settings for each field. For more information about each field, see [Data Import Settings]



Data Details panel

Definitions

Friendly Name (Mandatory)

A meaningful name for the data

Date Format

The date format in which the data is to be supplied. The default format is dd/MM/yyyy

Schema Name (Mandatory)

The name of the schema

Time Format

The time format in which the data is to be supplied. The default format is HH:mm:ss

Table Name (Mandatory)

The name of the table

Timestamp Format

The date and time format in which the data is to be supplied. The default format is dd/MM/yyyy HH:mm:ss

Description (Mandatory)

A meaningful description of the data

Save and close tray

Click this button to save the settings and hide the Data Import Settings panel

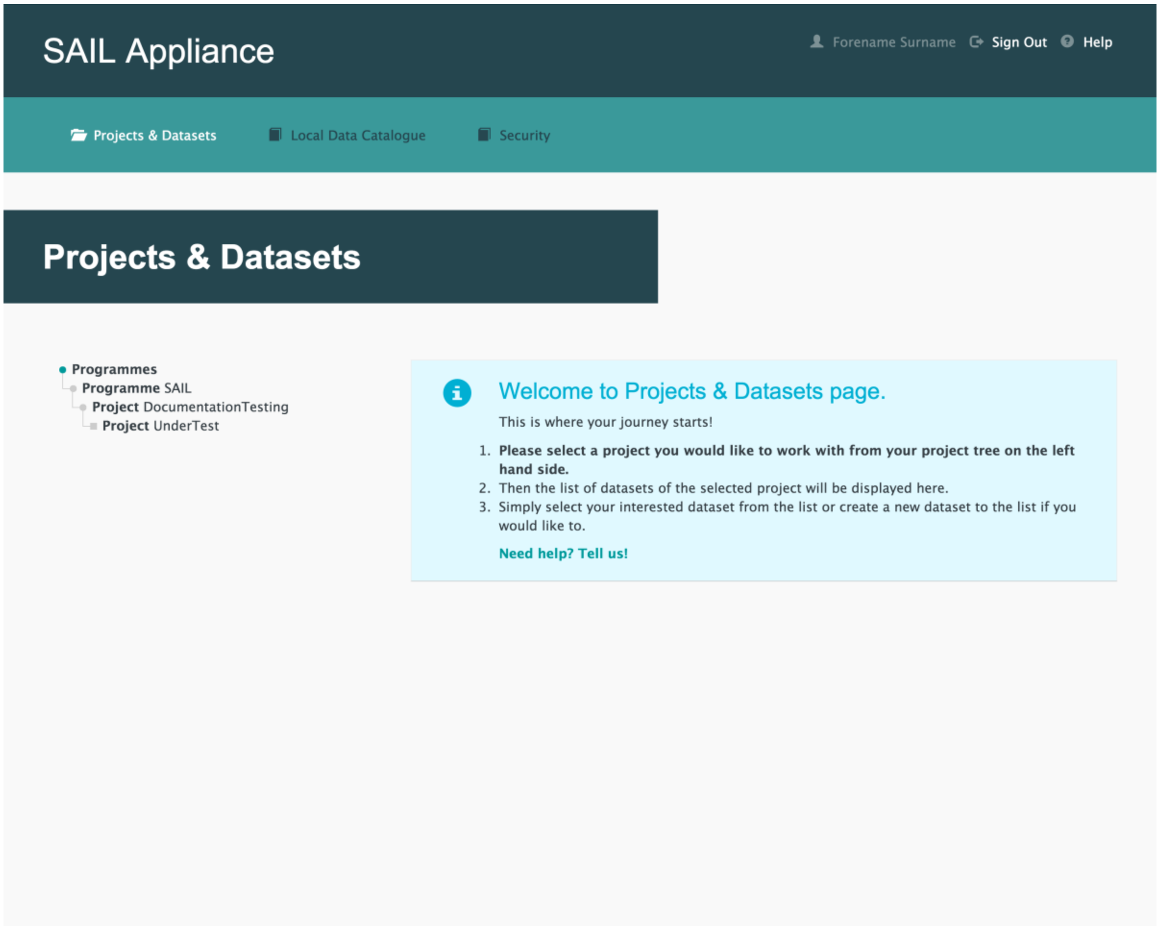
8. Click Save and close tray

How to check Data Details

The following steps show how to check the details of data that have been uploaded to a Dataset.

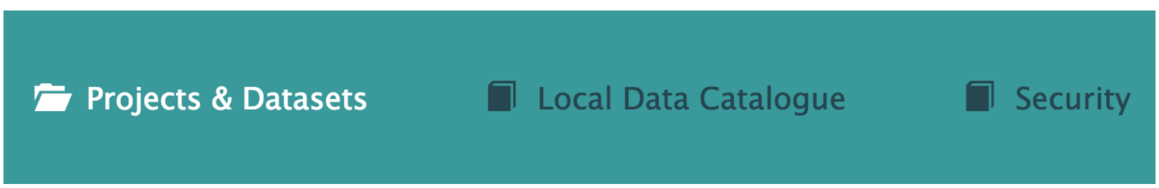
The Data Details panel is used to view and edit settings for data uploaded via the Data Files page. The settings in the Data Details panel should be checked before the Dataset is published.

1. Log in to the RDA



Default view of RDA user interface

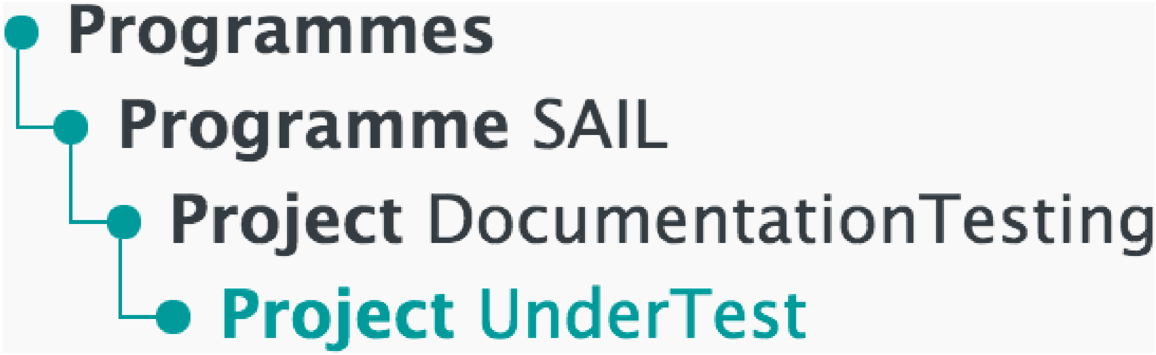
2. Click Projects & Datasets



Projects & Datasets menu item

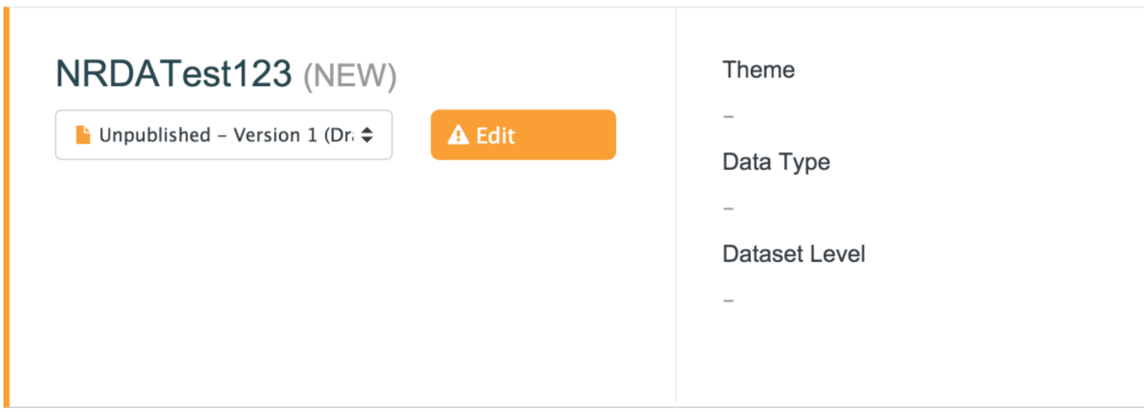
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit

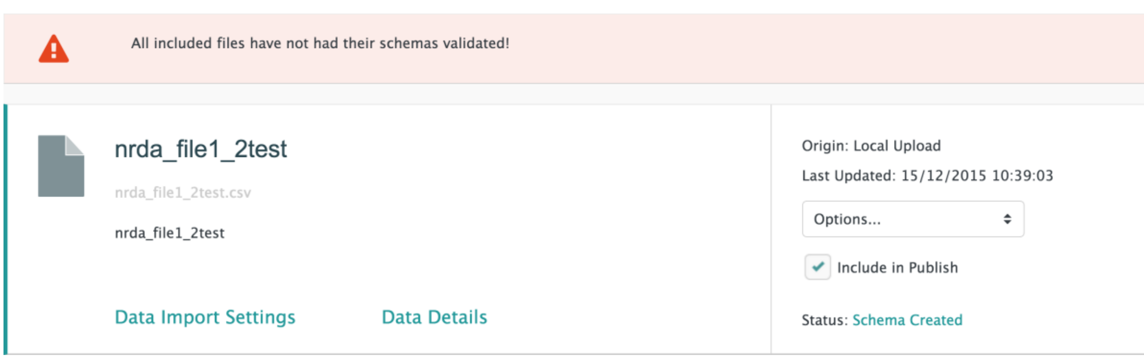


Sample unpublished Dataset

5. Click Data Files

Data Files menu item

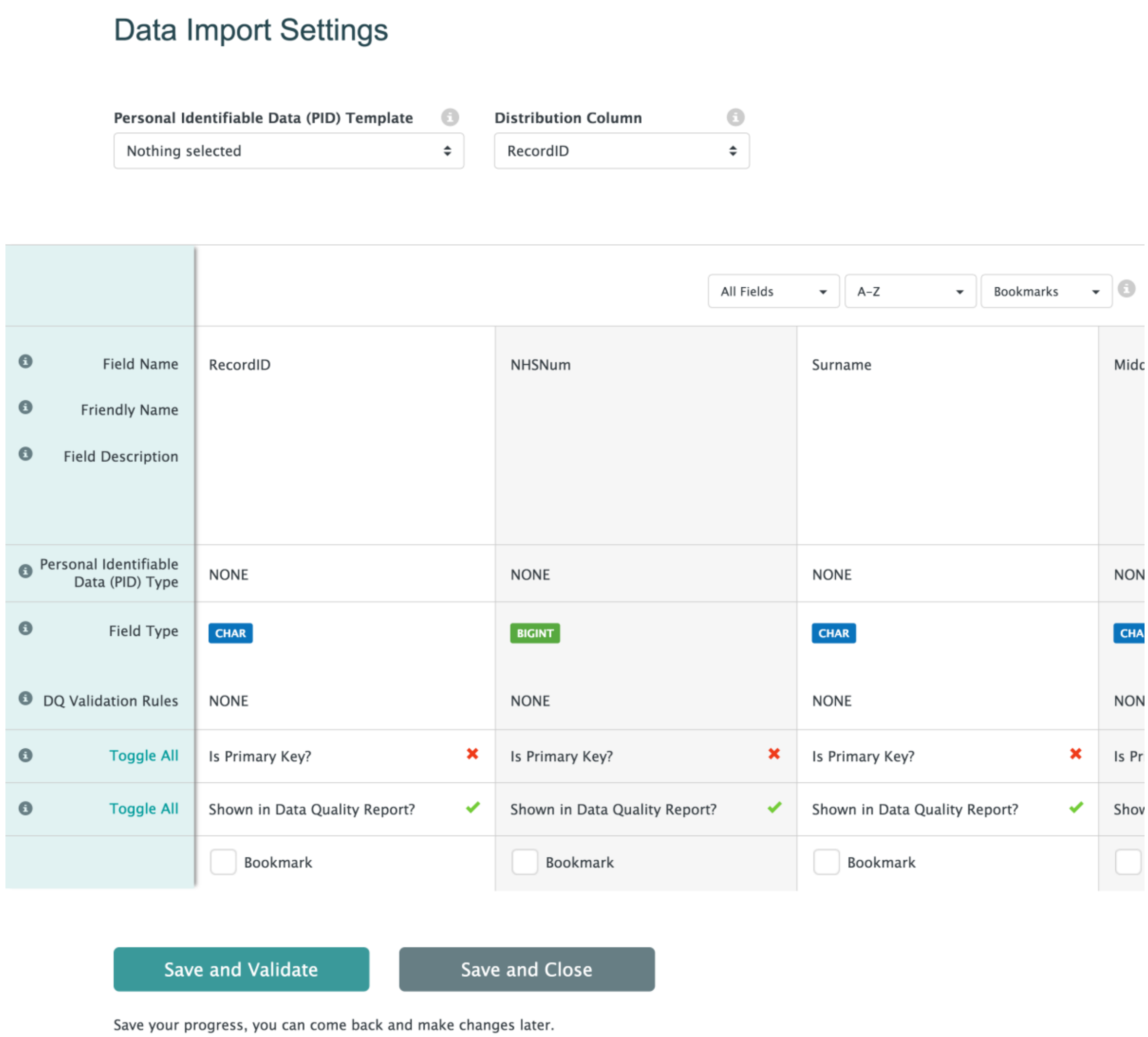
6. Click Data Details



Sample data file upload

The Data Import Settings panel is displayed.

7. Edit the settings for each field. For more information about each field, see [Data Details](#)



Data Import Settings

Definitions

Personal Identifiable Data (PID) Template

Choose a template that matches the Personal Identifiable Data in the uploaded data

Distribution Column

This allows data to be split among the partitions when data is uploaded to SAIL. There should be no need to change the default setting

Field Name

Automatically generated names of fields in the uploaded data. Any spaces in the data are replaced with underscores. The field names can be adjusted, but this should not be necessary

Friendly Name

A meaningful name for the field, which will be useful to a user who is not familiar with the data

Field Description

A short description of the data contained within the field

Personal Identifiable Data (PID) Type

The type of Personal Identifiable Data (if any) in the field. A Personal Identifiable Data Template must be chosen before this field can be edited

Field Type

An automated assessment of the type of data in the field, e.g. CHAR for alphanumeric data of a defined size

DQ Validation Rules

Add validation rules to confirm that the data is imported correctly

More info

- **NONE** – Default if no DQ rule is given
- **Range** – If the data should fall between two values, then specify the Min and Max values and this field's data will be validated during publish. Validation errors will be reported in the Data Quality Report. For numeric, date, time and datetime data types only
- **Local Lookup** – validate all the data of selected field against a temporary lookup table. All the valid values for the data field should be added in the local lookup table section. Any value of the field that cannot be found in the table is marked as invalid in the Data Quality Report. This option is recommended for use if a small number of valid values are dedicated to a certain field
- **Reference Table** – validate all the data of the selected field against certain values in a database lookup table by specifying the lookup table dataset name, lookup table name, and the lookup column name. Those values from the DB lookup table should contain all the valid values for that data field. Any value of the field that cannot be found in the lookup table is marked as invalid in the Data Quality Report

Primary Key

Tick this box to show that the field contains a unique identifier, e.g. an email address. More than one field may be marked as a Primary Key

Show in Data Quality Report

Tick this box to include the field in the Data Quality Report. Fields that are not relevant should be excluded

Bookmark

Tick this box to mark the field as a bookmark

Save and Validate

Click this button to save the changes and validate the data. The Pre-Publish process cannot proceed until all data has been validated

Save and Close

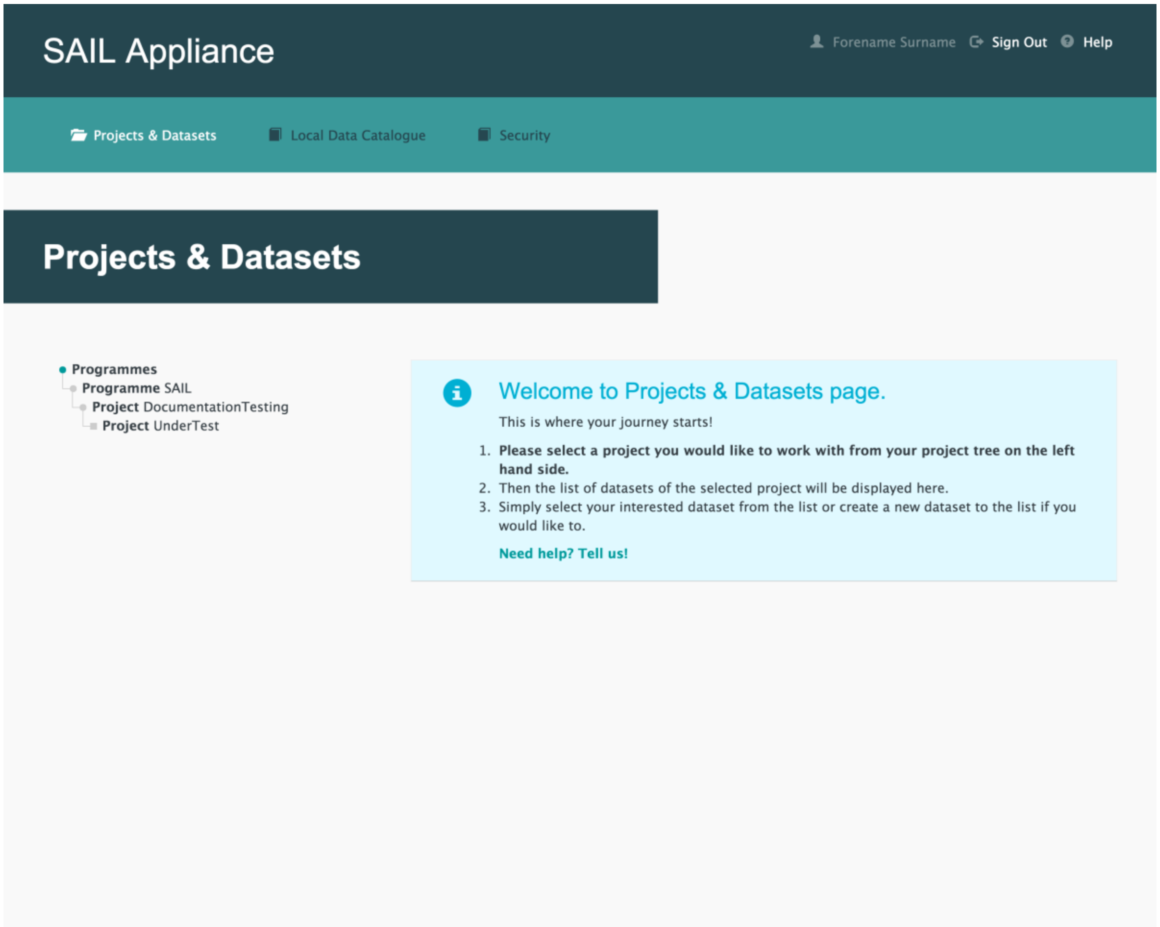
Click this button to save the changes and close the Data Details panel without attempting to validate the data

8. Click Save and Validate to validate the data, or click Save and Close to save without validating the data

How to upload a supporting file

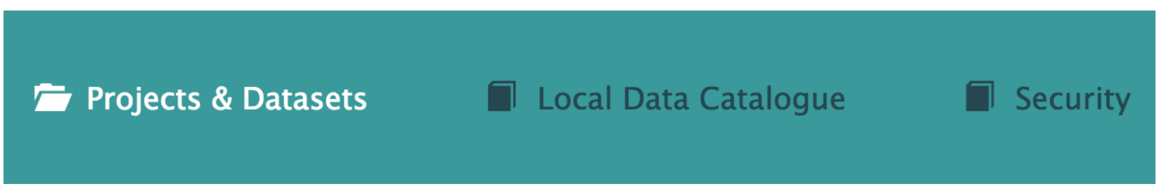
The following steps show how to upload a supporting file to an existing Dataset.

1. Log in to the RDA



Default view of RDA user interface

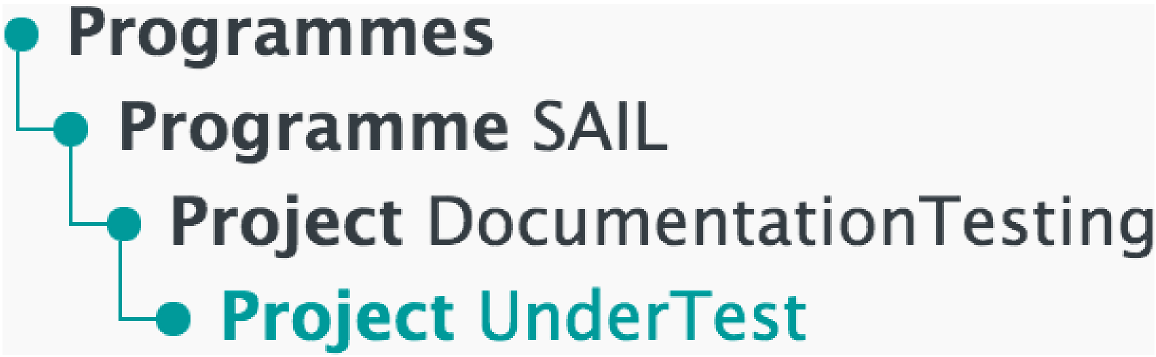
2. Click Projects & Datasets



Projects & Datasets menu item

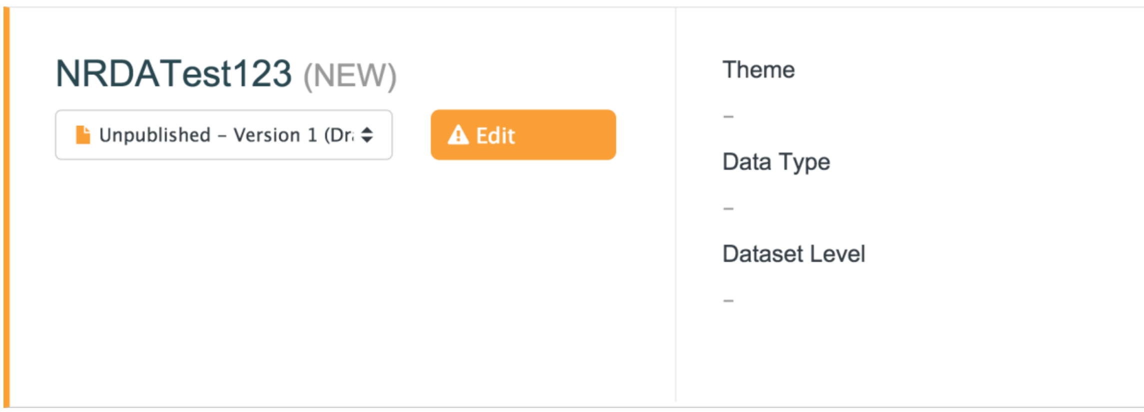
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit

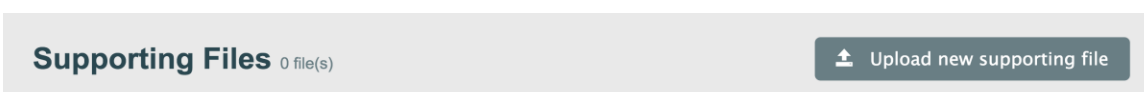


New Unpublished Dataset

5. Click Supporting Files

Supporting Files menu item

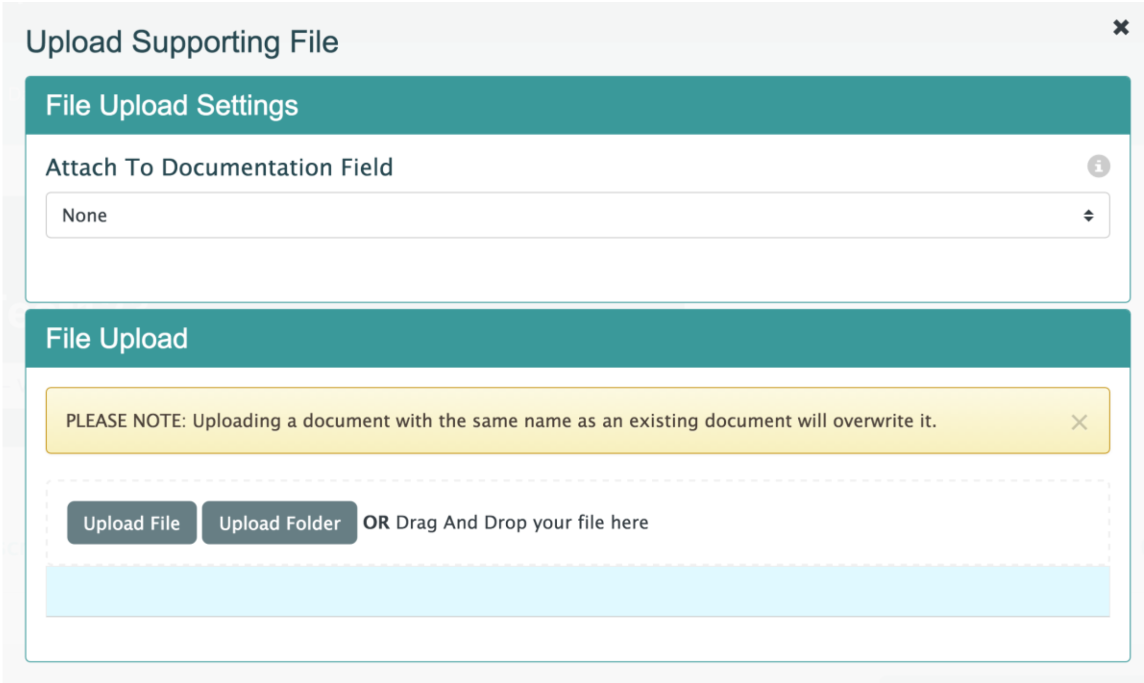
6. Click Upload new supporting file



Default view of Supporting Files page

The Upload Supporting File panel appears and prompts the user to upload a file or folder.

7. Select an option from the Attach To Documentation Field dropdown
8. Click Upload File or Upload Folder to upload the relevant content



Default view of Supporting Files page

Definitions

Attach To Documentation Field

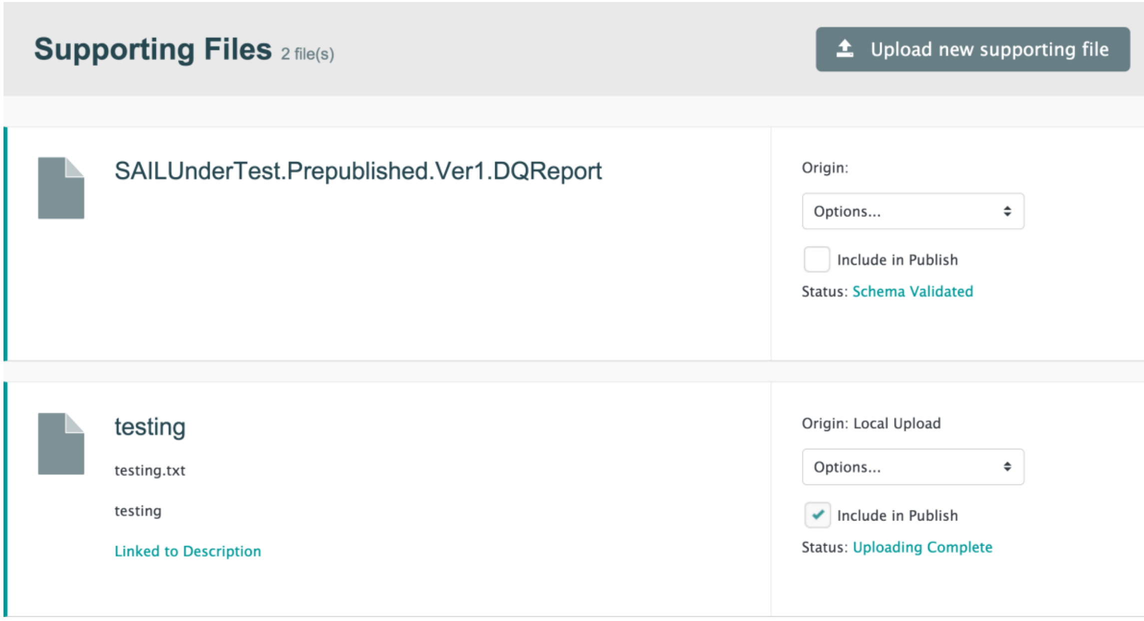
The field the supporting file should be associated with

Upload File

Click this button to upload a supporting file. Alternatively, click and drag a file to the File Upload section to directly upload it

Upload Folder

Click this button to upload a supporting folder. Alternatively, click and drag a file to the File Upload section to directly upload it



Default view of Supporting Files page

Definitions

Description

A description of the content of the supporting file, including a link to any section to which the supporting file has been assigned

Origin

The source of the uploaded file or folder, e.g. Local Upload

Options…

The following options are available for the selected file or folder:

- **Validate Schema** – check and validate the schema for the data. The Dataset cannot be published until the schema is validated
- **Update** – refresh the uploaded file or folder with new data
- **Download** – download a copy of the file or folder
- **Remove** – remove the file or folder from the Dataset

Include in Publish

Tick this box to include the data in the published Dataset. Once published, the content will be available in the Local Data Catalogue

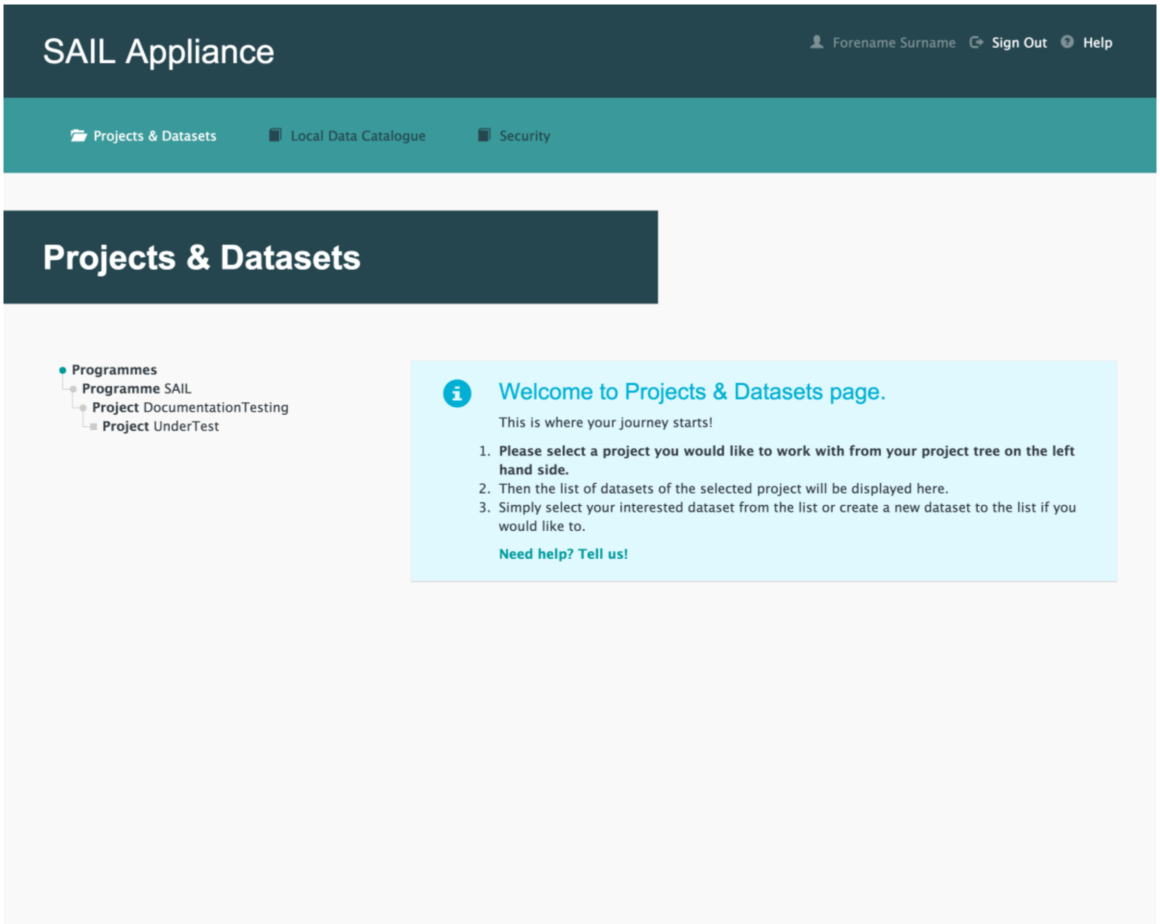
Status

The status of the file or folder, e.g. Schema Created, Uploading Complete

How to check Dataset status

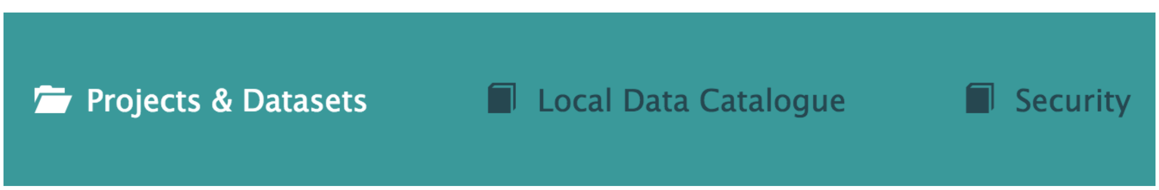
The following steps show how to check the status of a Dataset.

1. Log in to the RDA



Default view of RDA user interface

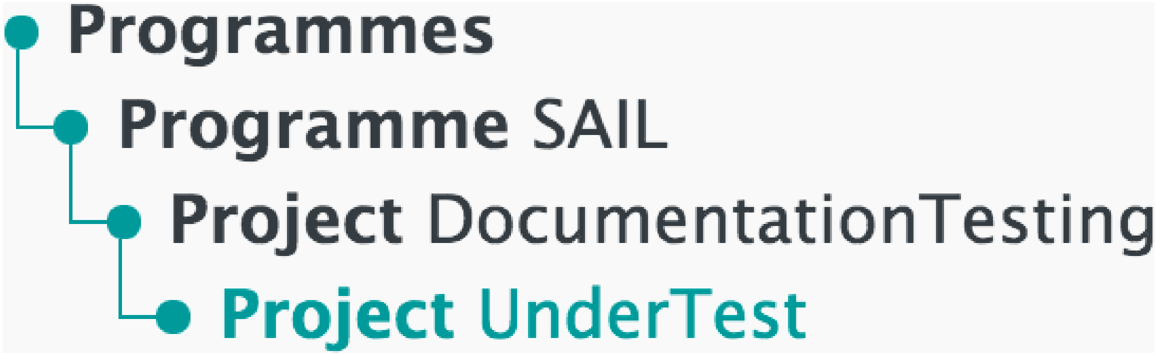
2. Click Projects & Datasets



Projects & Datasets menu item

The Projects & Datasets section is selected by default.

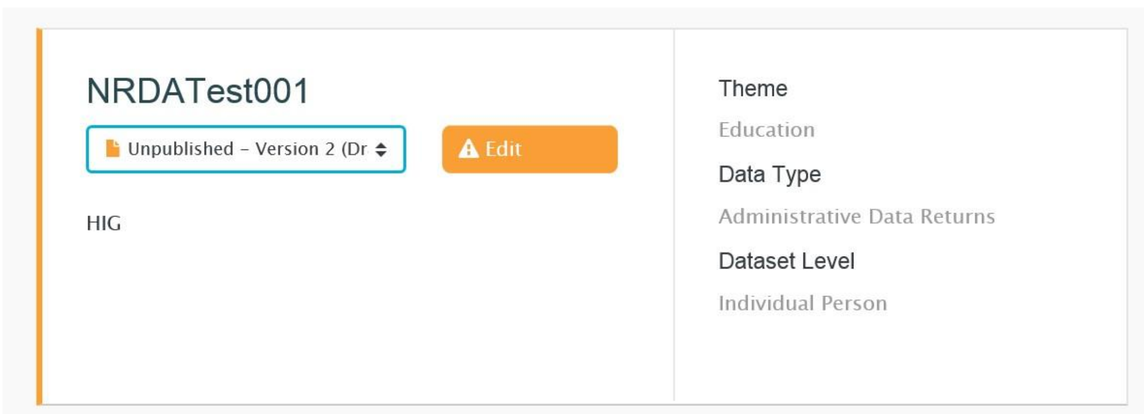
3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

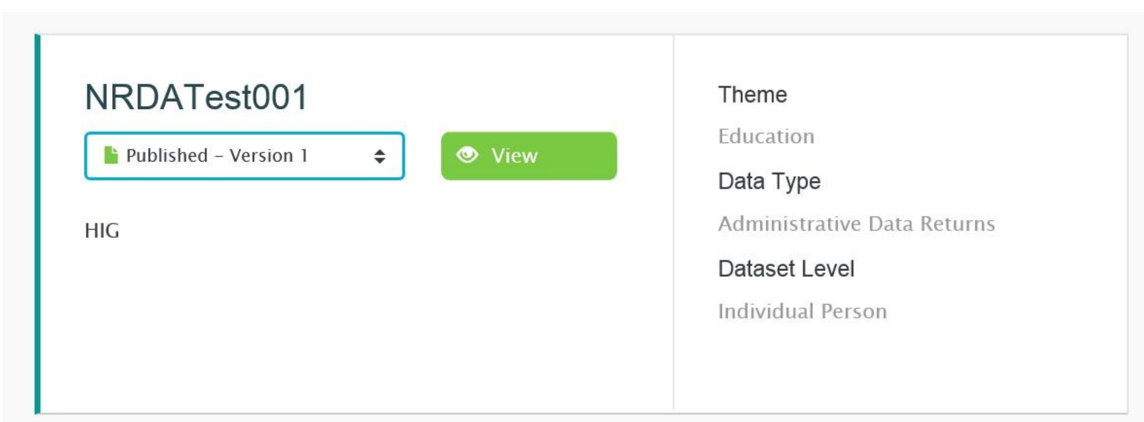
All Datasets in the Project are displayed. These Datasets will either be in an unpublished state or a published state.

Unpublished Datasets look like the example shown below:



Unpublished Dataset

Published Datasets look like the example shown below:

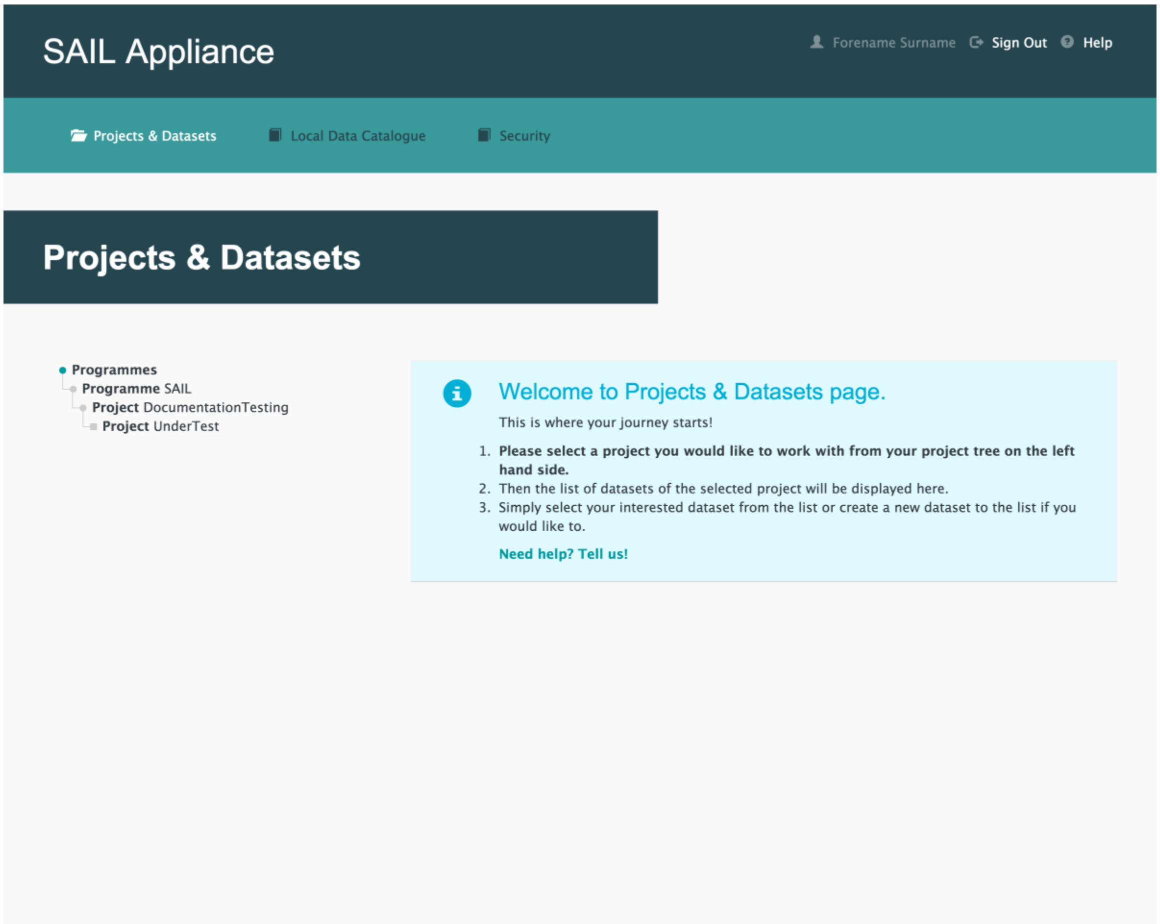


Published Dataset

How to create a Share Profile

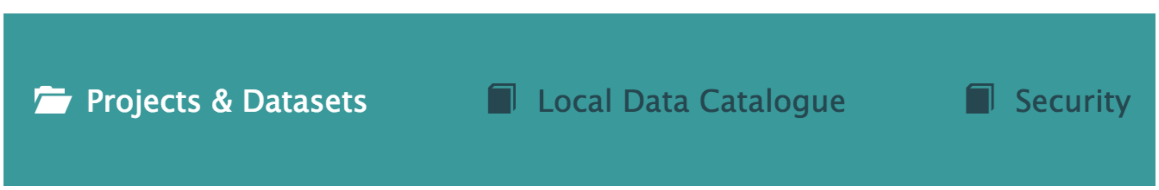
The following steps show how to create a Share Profile.

1. Log in to the RDA



Default view of RDA user interface

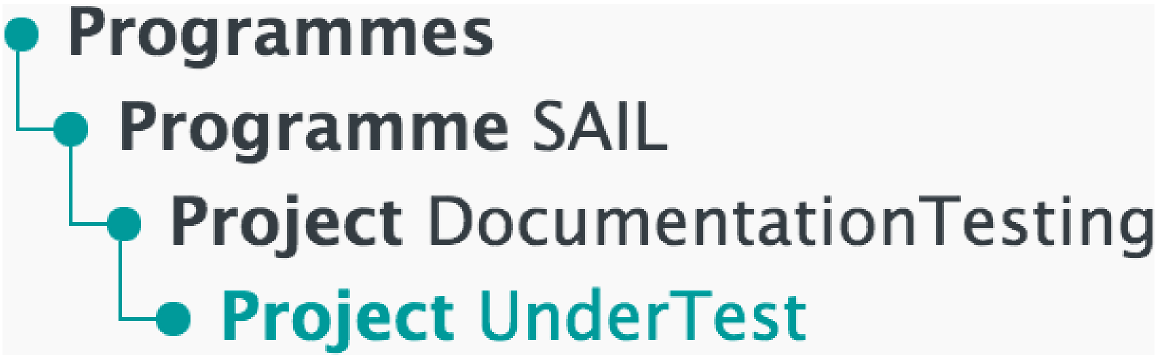
2. Click Projects & Datasets



Projects & Datasets menu item

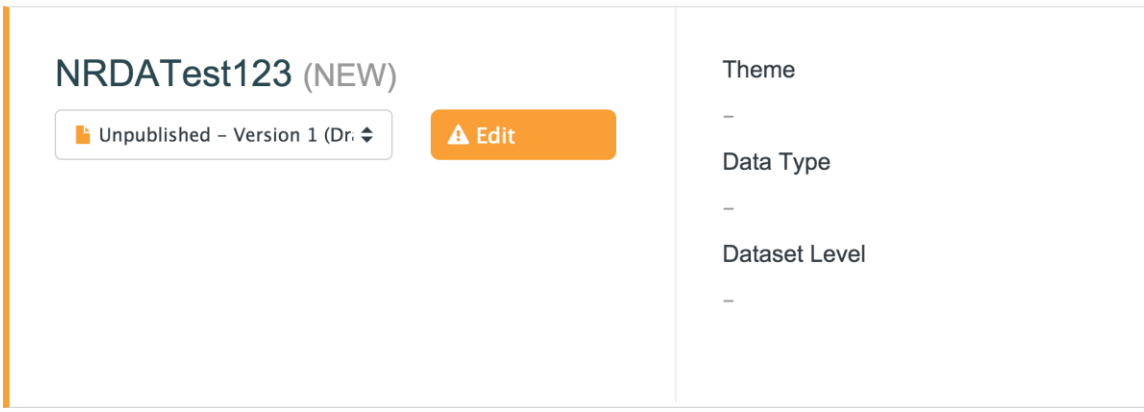
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit



Sample unpublished Dataset

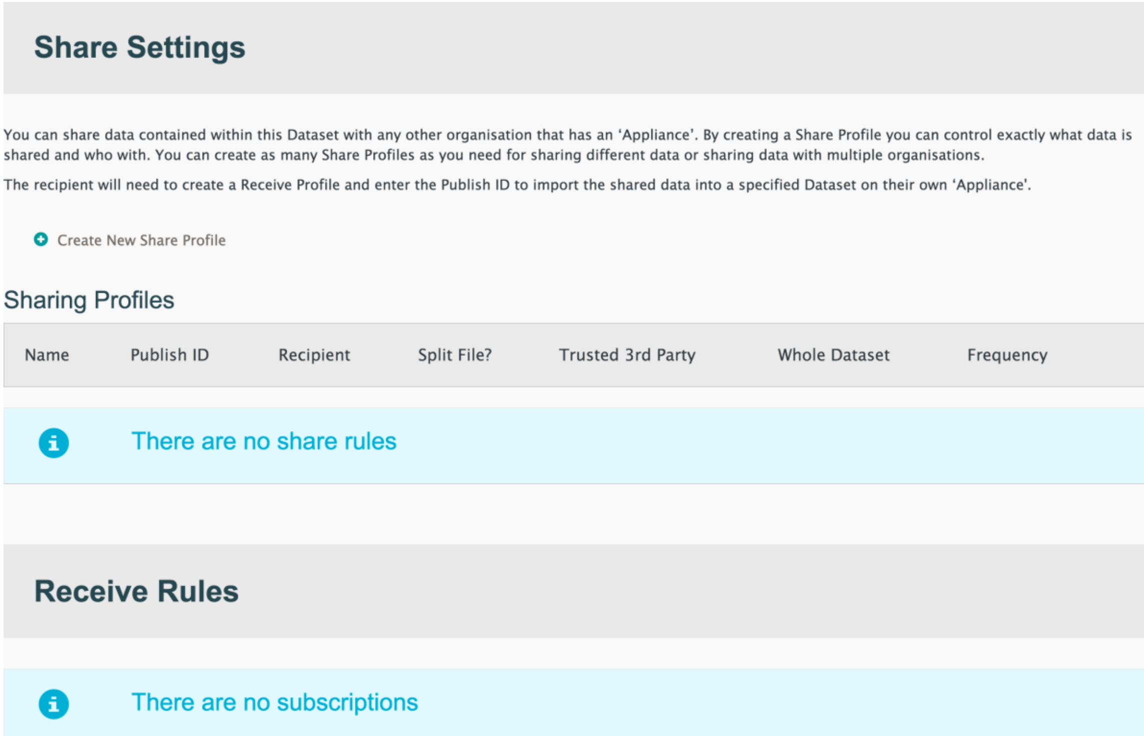
5. Click Share Settings

Share Settings menu item

Once data has been uploaded and validated, a Create New Share Profile link appears on the Share Settings page.

6. Click Create New Share Profile

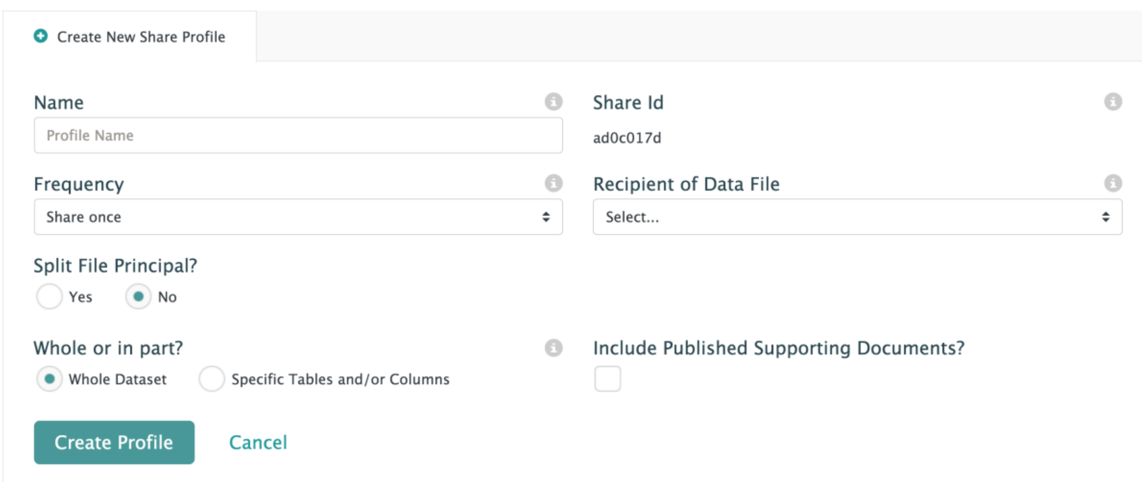
> The Create New Share Profile link appears only after some data has been uploaded. For information on uploading data, see [How to upload data](#).



Share Settings page after data has been uploaded and validated

The Create New Share Profile panel appears, as shown below:

7. Complete the fields, and then click Create Profile



Create New Share Profile panel

Definitions

Name

A name to identify the Share Profile

Share Id

An auto-generated string required by the recipient in order for them to access the Dataset in their Appliance

Frequency

The number of times to share the data.

- **Share once** – A single share of the Dataset. The recipient will not receive a new version when the Dataset is updated
- **Share every publish** – An ongoing share of the Dataset. The recipient will receive a new version whenever the Dataset is updated

Recipient of Data File

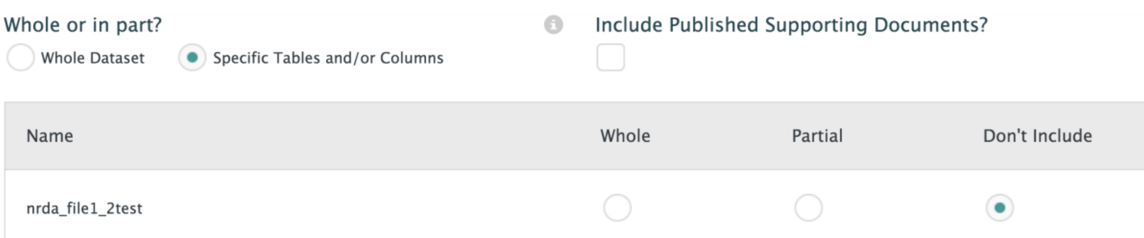
Name of the Appliance with which the data will be shared

Split File Principal

Choose whether the data should be split for anonymisation by a trusted third party

Whole or in part?

Choose whether the whole Dataset is shared. Selecting Specific Tables and/or Columns reveals an extra option to choose the relevant data



Name	Whole	Partial	Don't Include
nrda_file1_2test			

Select **Specific Tables and/or Columns**, then choose partial data

Include Published Supporting Documents?

Tick the box to include all published supporting documents with the shared data

Create Profile

Click this button to confirm the creation of the new Share Profile

Cancel

Click this button to stop the creation of the new Share Profile

The new Share Profile will appear in the Sharing Profiles section of the page, as shown below:

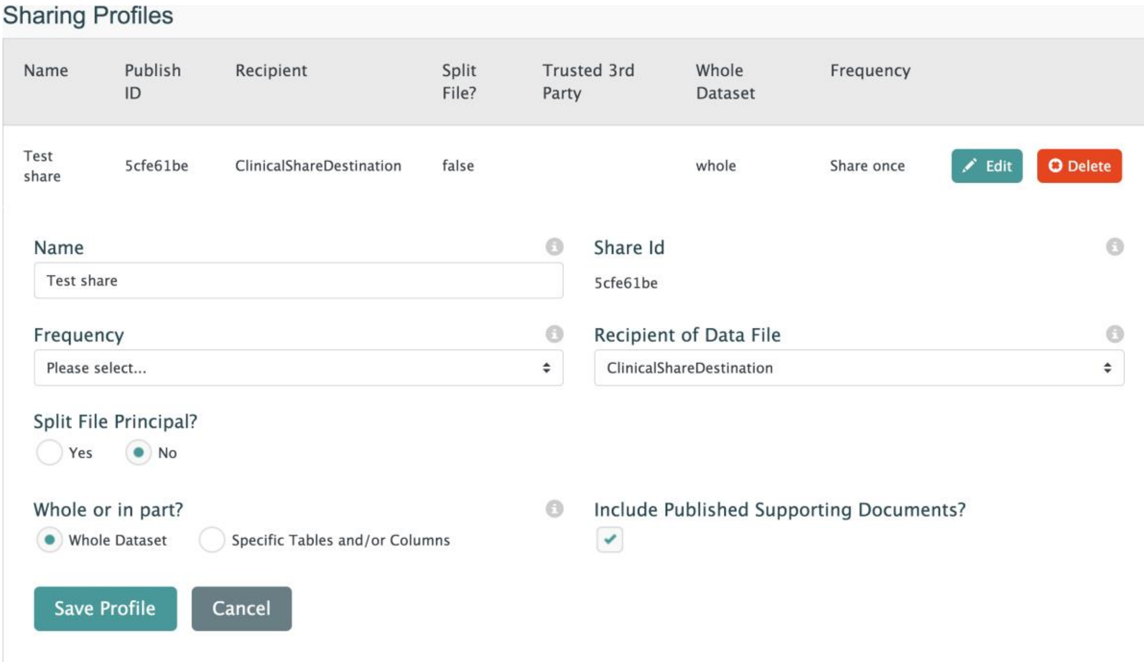
Sharing Profiles

Name	Publish ID	Recipient	Split File?	Trusted 3rd Party	Whole Dataset	Frequency	
Test share	5cfe61be	ClinicalShareDestination	false		whole	Share once	Edit Delete

Sample Share Profile

8. Click Edit to adjust the settings of the Share Profile

A new panel shows the existing settings with options to adjust the settings, as shown below:



Editing a Share Profile

Definitions

Save Profile

Save changes to the Share Profile and hide the editing panel

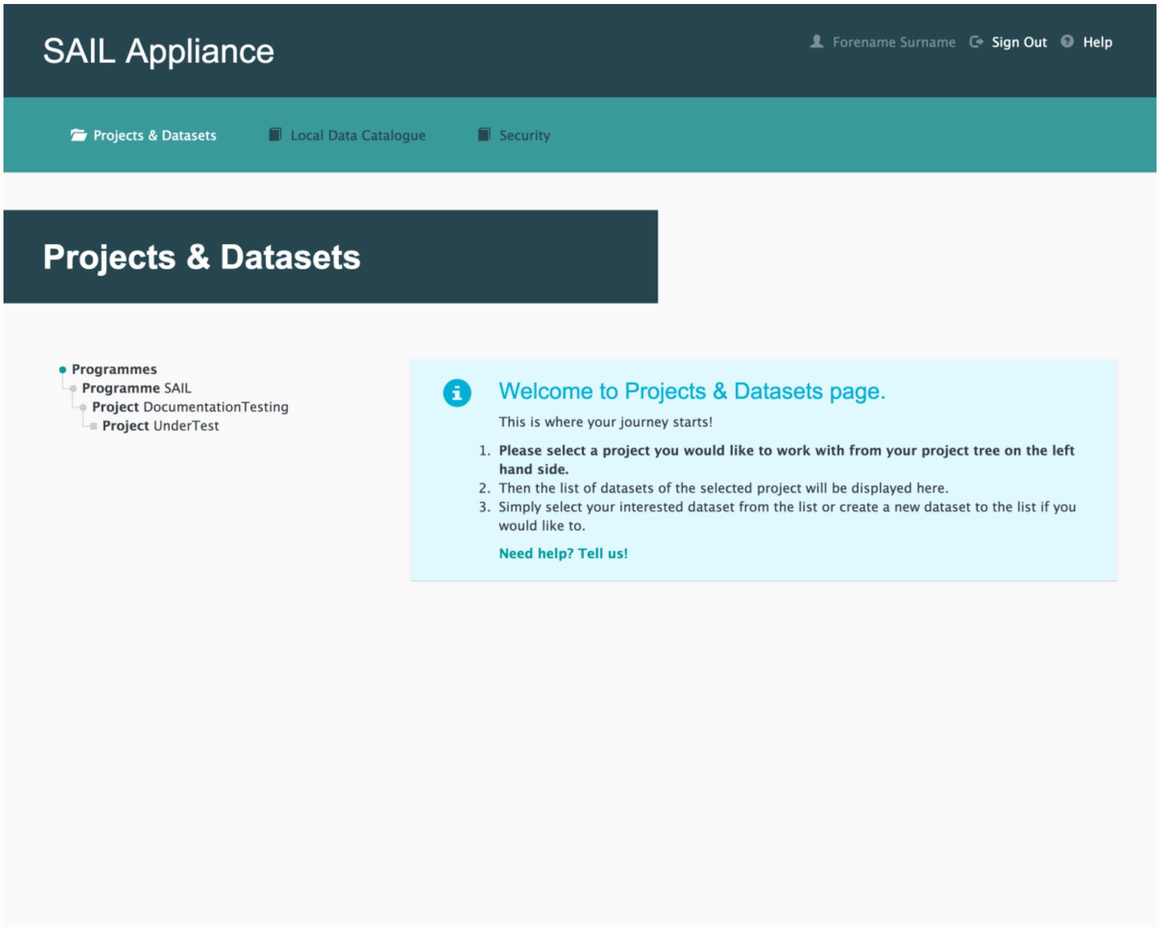
Cancel

Cancel changes to the Share Profile and hide the editing panel. Pressing Edit again will also produce the same result

How to access the Data Quality Report

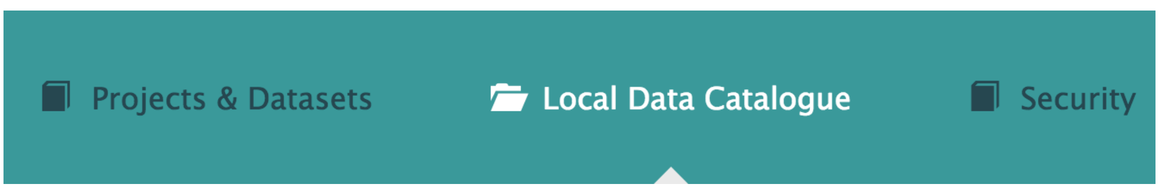
The following steps show how to access the Data Quality Report.

1. Log in to the RDA



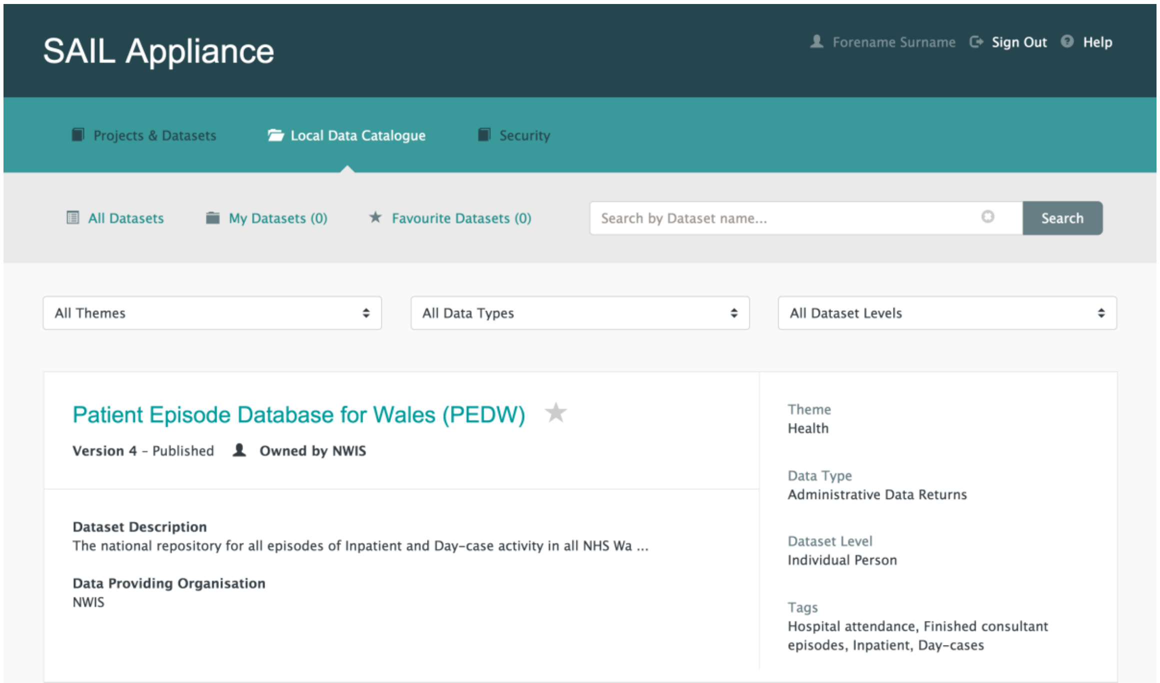
Default view of RDA user interface

2. Click Local Data Catalogue



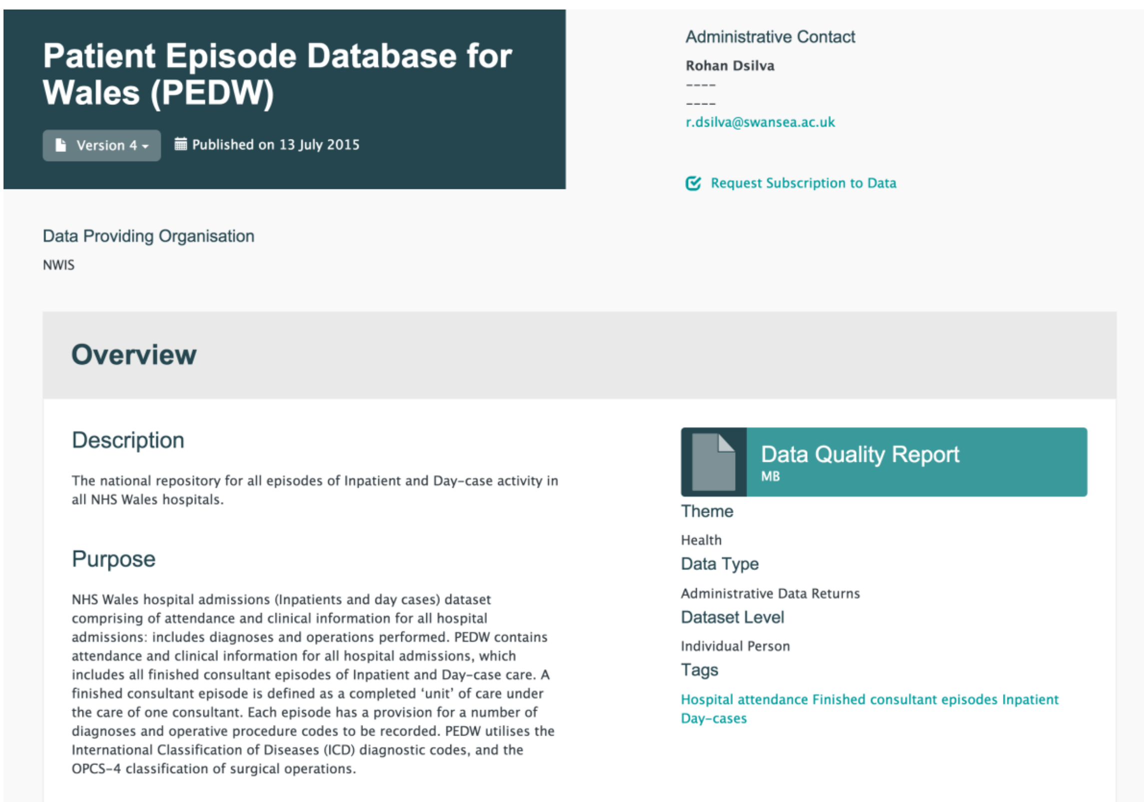
Local Data Catalogue menu item

3. Click the relevant Dataset. For more information, see [How to search for a Dataset]



Local Data Catalogue page

4. Click Data Quality Report. For more information, see [Data Quality Report](#)



Local Data Catalogue page with Dataset selected – Overview section

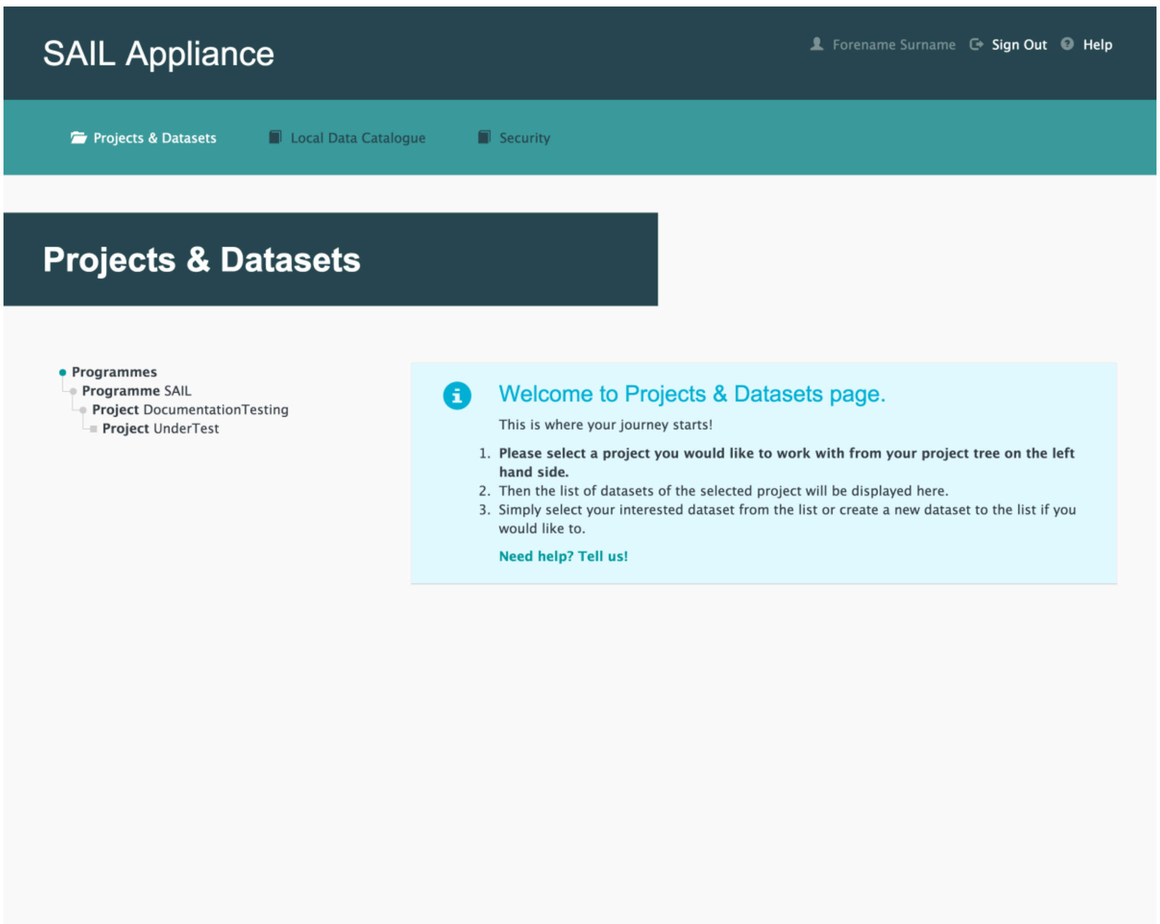
Sharing tasks

- How to create a Share Profile – creating a Share Profile
- How to share a Dataset with an internal organisation – sharing data within your organisation
- How to share a Dataset with an external organisation – sharing data outside your organisation

How to create a Share Profile

The following steps show how to create a Share Profile.

1. Log in to the RDA



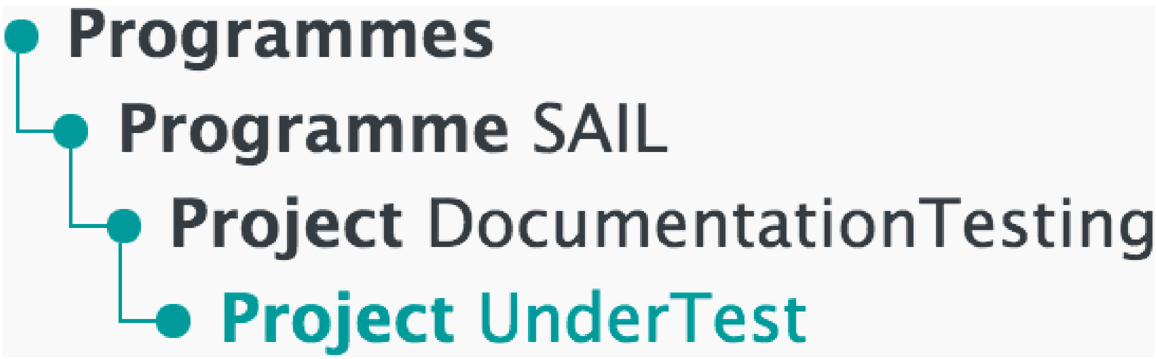
Default view of RDA user interface

2. Click Projects & Datasets

Projects & Datasets menu item

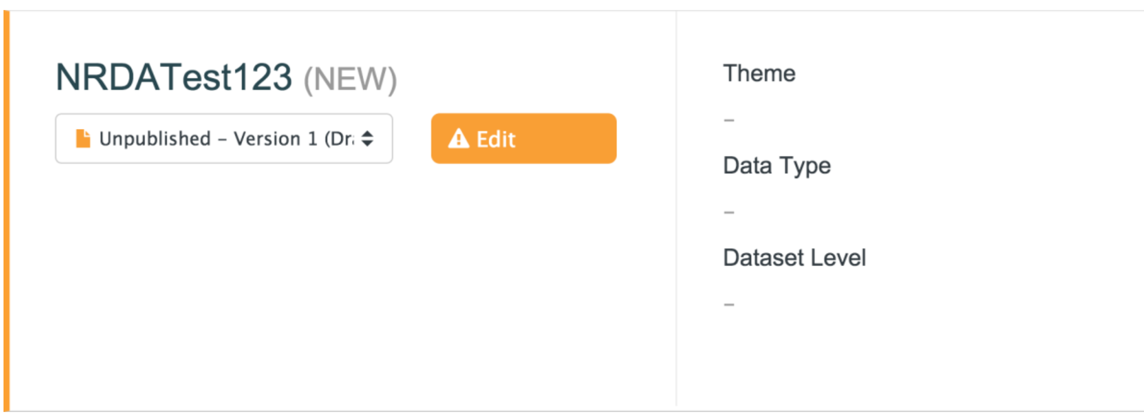
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit



Sample unpublished Dataset

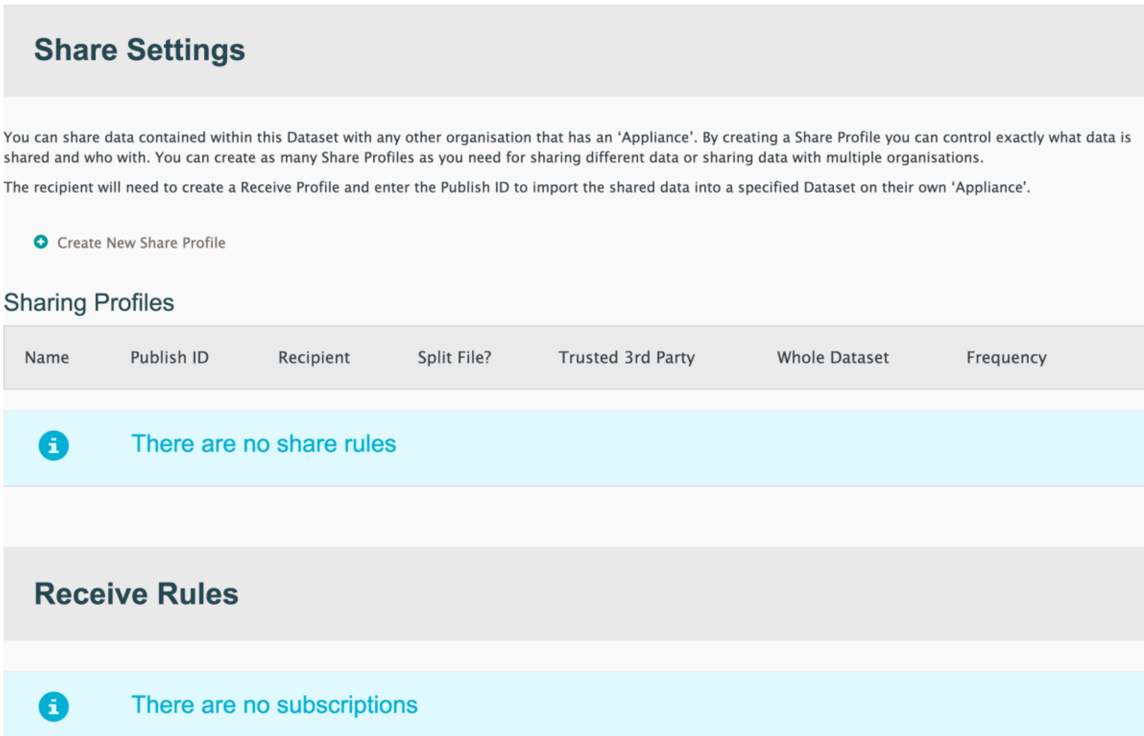
5. Click Share Settings

Share Settings menu item

Once data has been uploaded and validated, a Create New Share Profile link appears on the Share Settings page.

6. Click Create New Share Profile

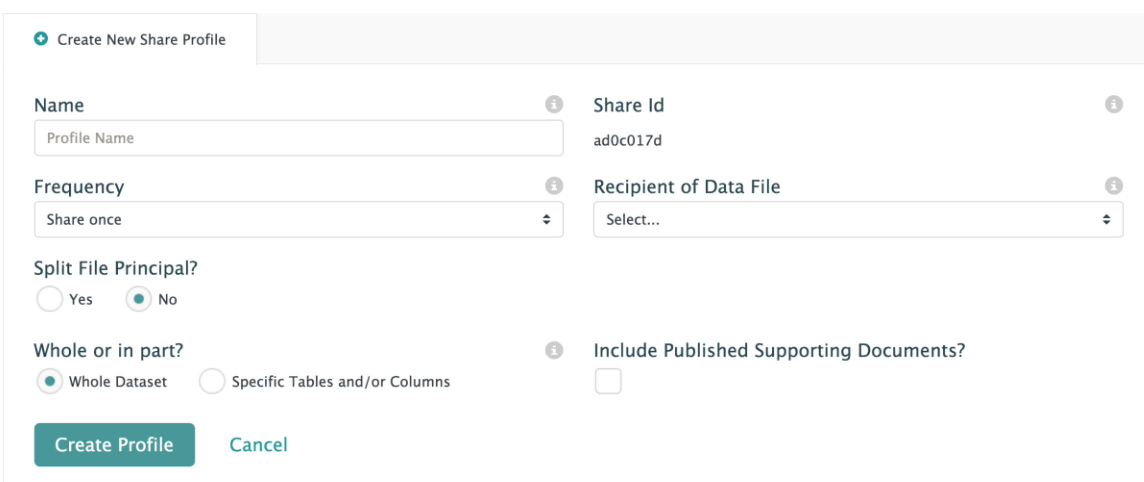
> The Create New Share Profile link appears only after some data has been uploaded. For information on uploading data, see [How to upload data].



Share Settings page after data has been uploaded and validated

The Create New Share Profile panel appears, as shown below:

7. Complete the fields, and then click Create Profile



Create New Share Profile panel

Definitions

Name

A name to identify the Share Profile

Share Id

An auto-generated string required by the recipient in order for them to access the Dataset in their Appliance

Frequency

The number of times to share the data.

- **Share once** – A single share of the Dataset. The recipient will not receive a new version when the Dataset is updated
- **Share every publish** – An ongoing share of the Dataset. The recipient will receive a new version whenever the Dataset is updated

Recipient of Data File

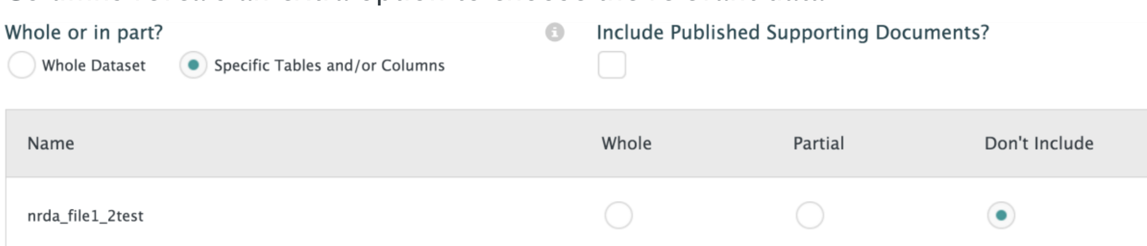
Name of the Appliance with which the data will be shared

Split File Principal

Choose whether the data should be split for anonymisation by a trusted third party

Whole or in part?

Choose whether the whole Dataset is shared. Selecting Specific Tables and/or Columns reveals an extra option to choose the relevant data



Select **Specific Tables and/or Columns**, then choose partial data

Include Published Supporting Documents?

Tick the box to include all published supporting documents with the shared data

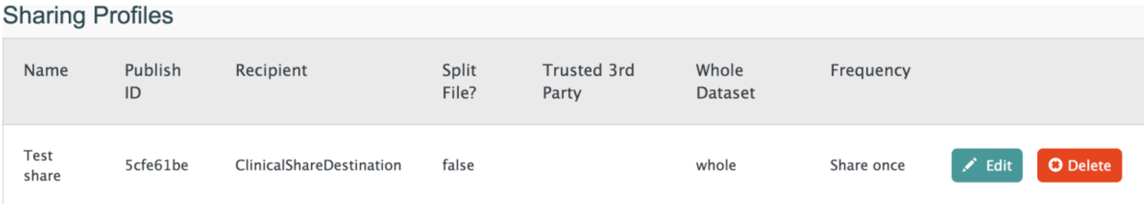
Create Profile

Click this button to confirm the creation of the new Share Profile

Cancel

Click this button to stop the creation of the new Share Profile

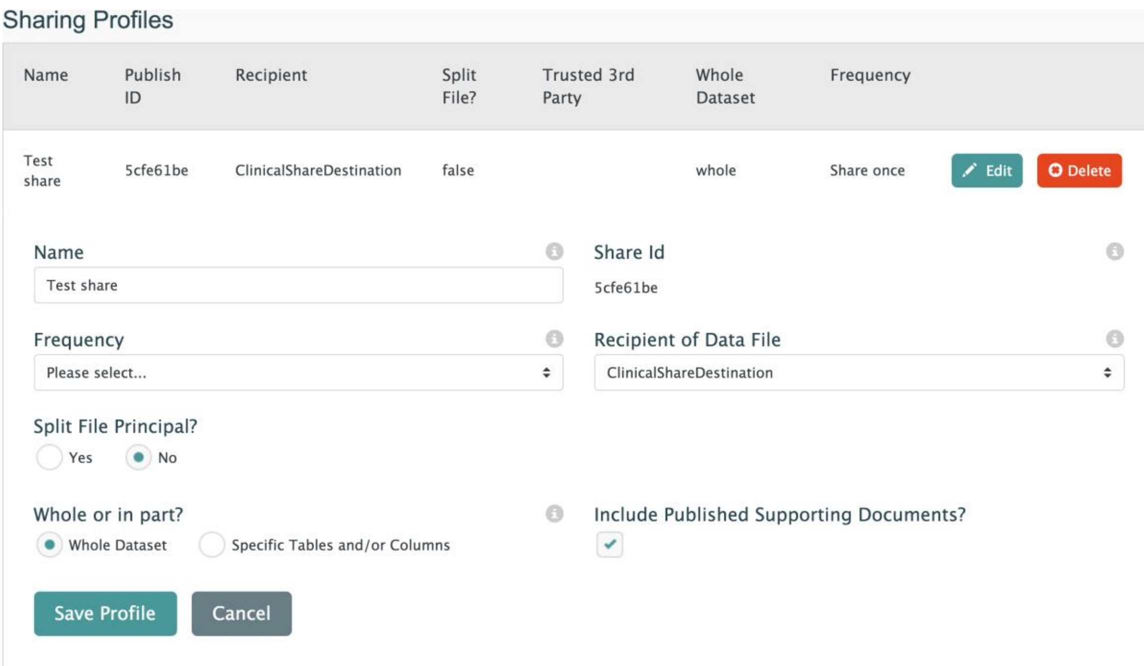
The new Share Profile will appear in the Sharing Profiles section of the page, as shown below:



Sample Share Profile

8. Click Edit to adjust the settings of the Share Profile

A new panel shows the existing settings with options to adjust the settings, as shown below:



Editing a Share Profile

Definitions

Save Profile

Save changes to the Share Profile and hide the editing panel

Cancel

Cancel changes to the Share Profile and hide the editing panel. Pressing Edit again will also produce the same result

How to share a Dataset with an internal organisation

The following steps show how to share a Dataset with members of an internal organisation.

Method 1

Add the user(s) to the relevant Project. See [How to add a user to a Project or Sub Project]

Method 2

Follow the steps for sharing with an external organisation, but select the internal organisation instead when creating the Share Profile. For more information, see [How to share a Dataset with an external organisation]

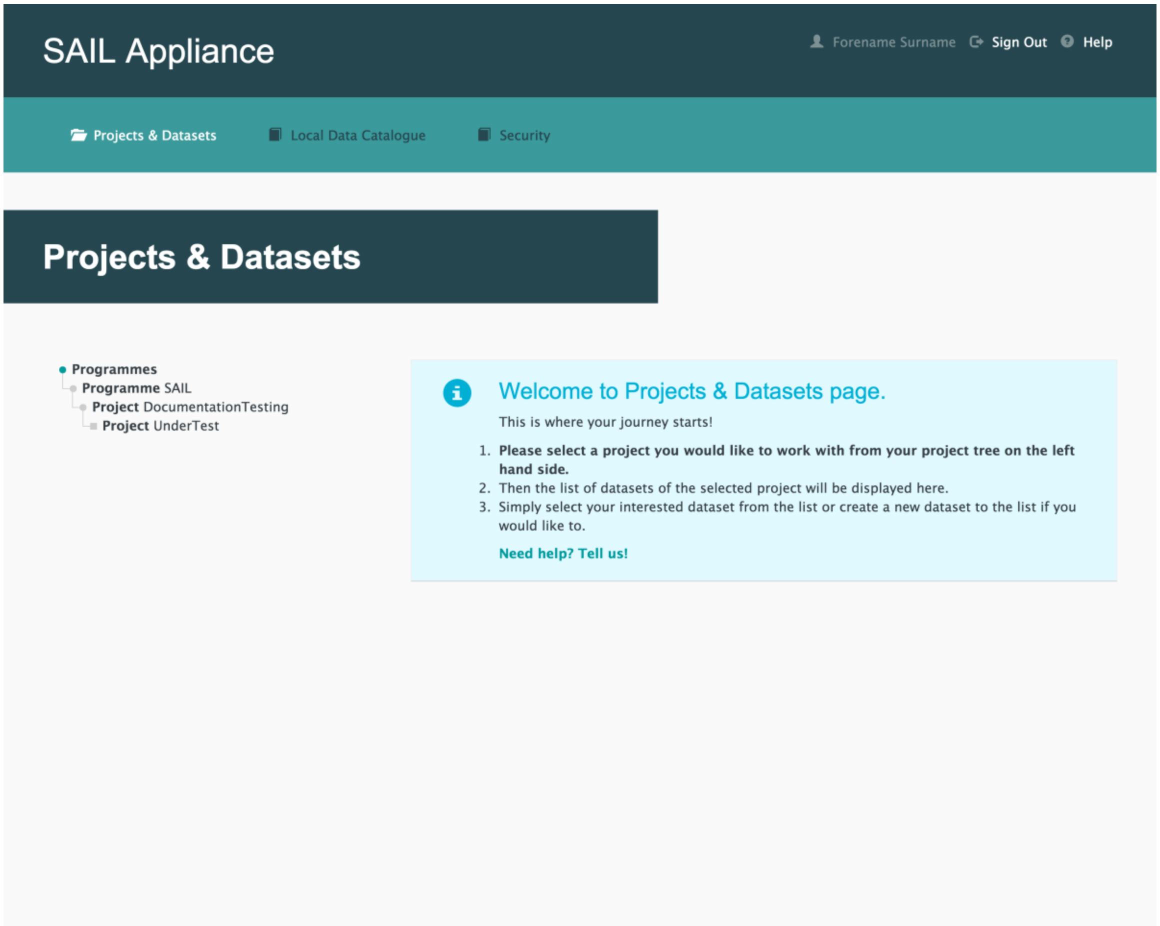
How to share a Dataset with an external organisation

The following steps show how to share a Dataset with an external organisation.

1. Add **Clinical Share Destination** and **Demographics Share Destination** Capabilities to the Project

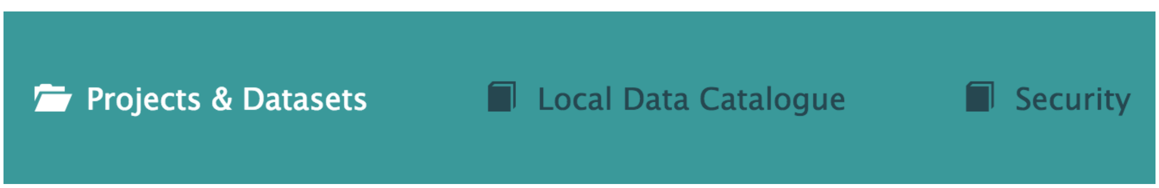
> Standard users are not able to add Capabilities to a Project. The above action needs to be performed by an administrator. See [Capabilities].

2. Log in to the RDA



Default view of RDA user interface

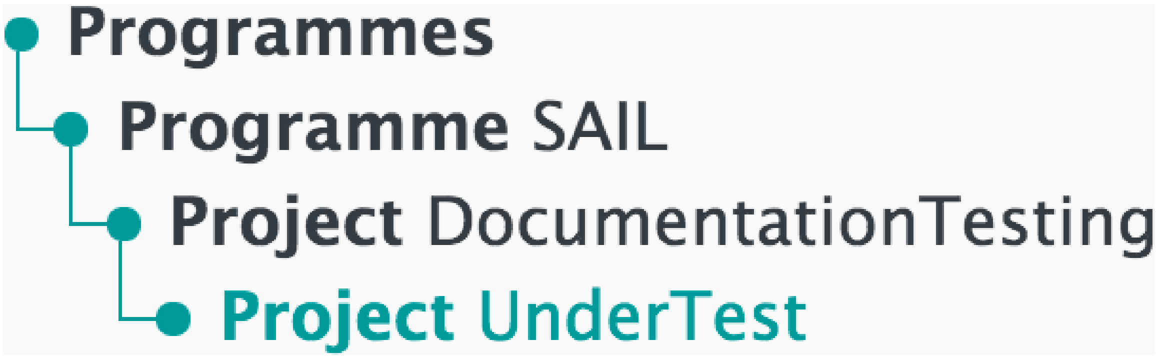
3. Click Projects & Datasets



Projects & Datasets menu item

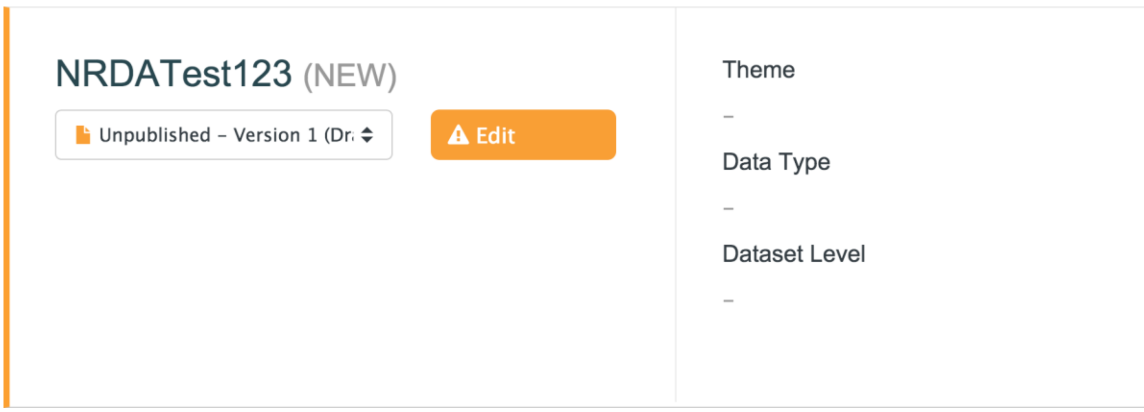
The Projects & Datasets section is selected by default.

4. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

5. Click Edit



Sample unpublished Dataset

6. Click Share Settings

Share Settings menu item

7. Create a Share Profile and select the external organisation with which to share the Dataset. For more information, see How to create a

User interface

The following pages describe the operation of the RDA user interface.

Home

This section of the user interface allows users to get started and access all available parts of the system.

Projects & Datasets

This section of the user interface allows users to create Projects within a Programme. A Project may contain its own Projects and Sub Projects.

Local Data Catalogue

This section of the user interface allows users to view Datasets that have been published via the Projects & Datasets page.

Security

This section of the user interface allows administrators (Project Leads) and standard users (Analysts) to create sub Projects within their Programme. Users can also create user accounts based on the organisation's Active Directory.

Data Quality Report

When a Dataset is uploaded in Projects & Datasets, the system creates a Data Quality Report. This summary of the uploaded data is viewable in the Local Data Catalogue.

Home

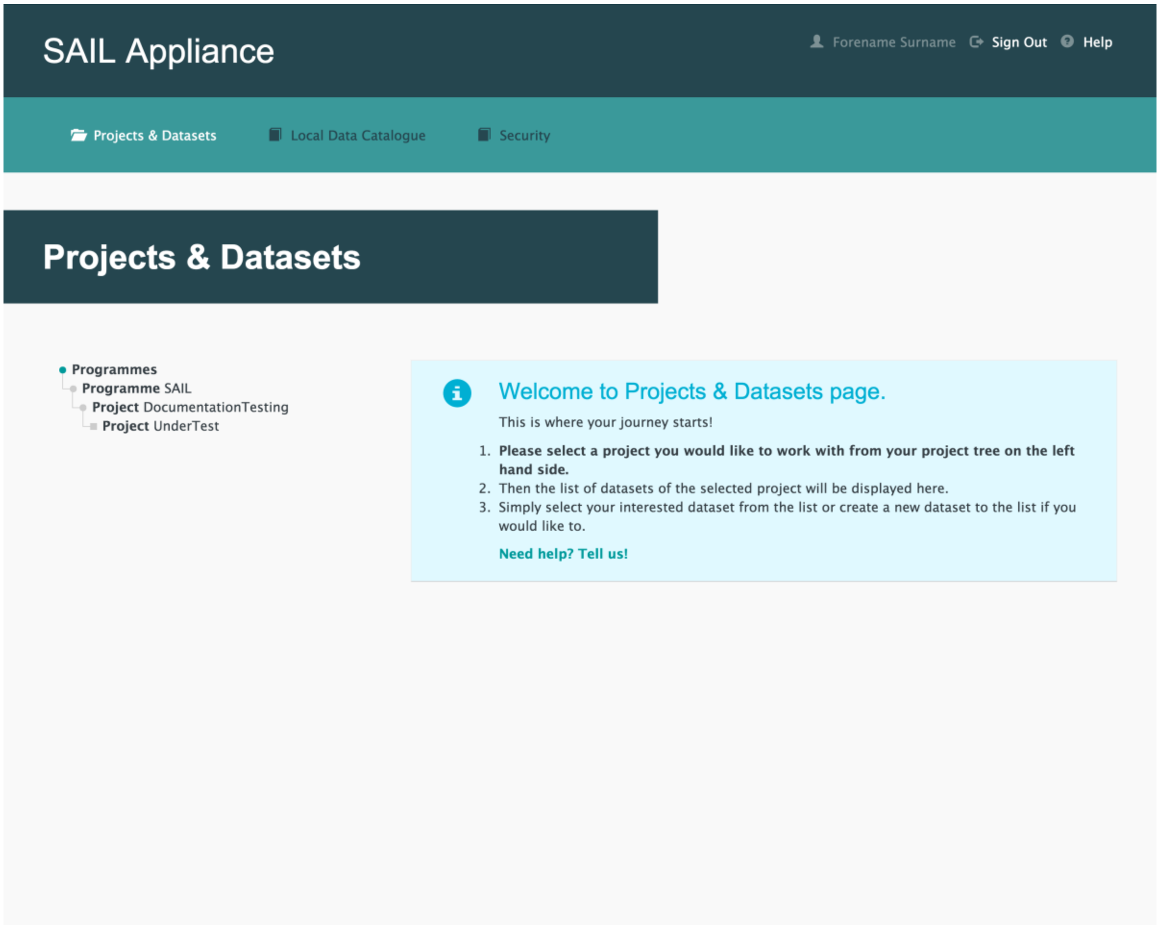
This section of the user interface allows users to get started and access all available parts of the system.

For more information about the user interface, see the following sections of the user guide:

- Projects & Datasets
- Local Data Catalogue

- [Security]

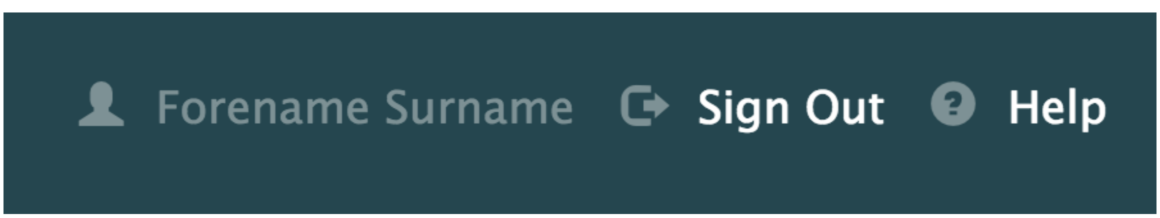
The default view of the RDA user interface is shown below:



Default view of RDA user interface

Page components

Login information and a help link appears in the top-right corner of the user interface:



Login information

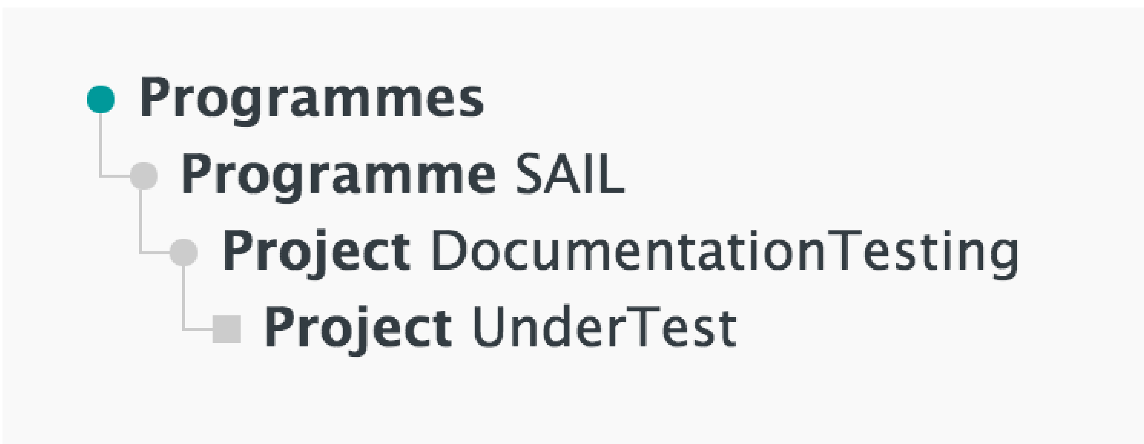
Subsections of the current page appear in a horizontal list near the top of the user interface:

Section navigation list

Below the navigation list is the current page title:

Current page title

The left-hand side of the page includes an expandable list of all Programmes and Projects available to the current user:



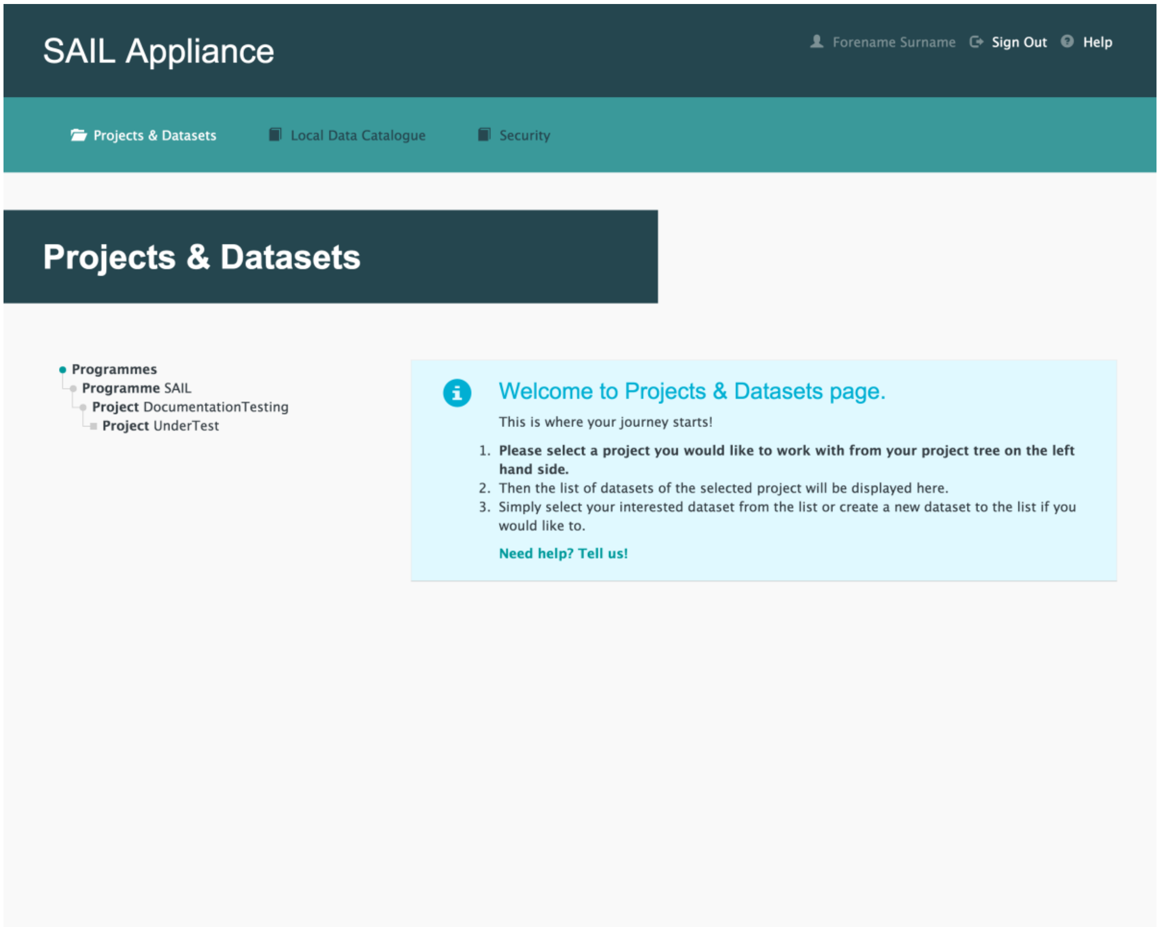
Programmes and Projects available to current user

Projects & Datasets

This section of the user interface allows users to create Projects within a Programme. A Project may contain its own Projects and Sub Projects.

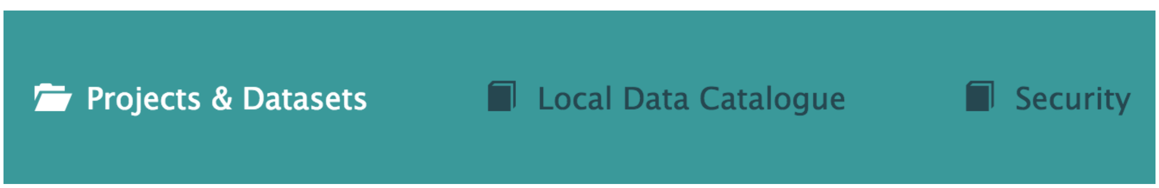
To view this page

1. Log in to the RDA



Default view of RDA user interface

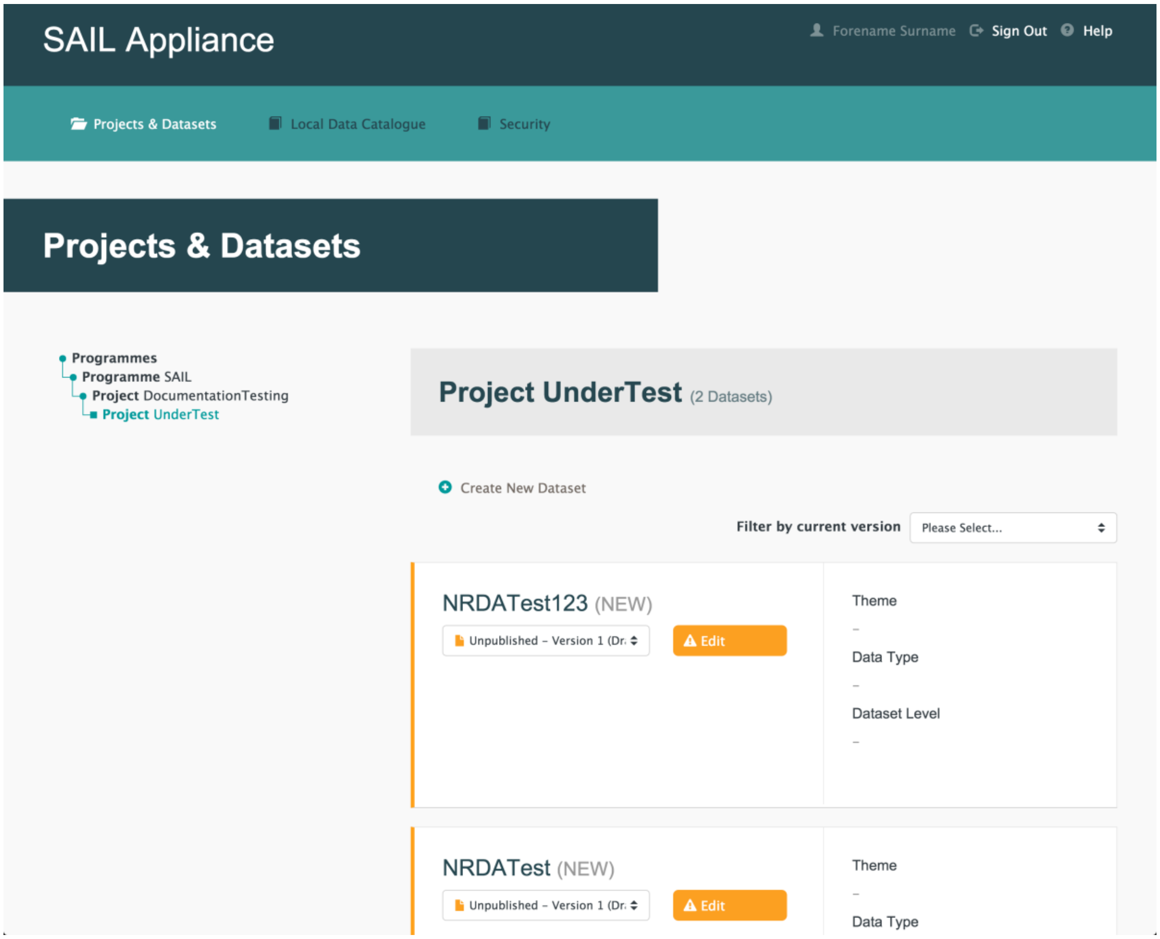
2. Click Projects & Datasets



Projects & Datasets menu item

The Projects & Datasets section is selected by default.

A typical view of the Projects & Datasets page is shown below:



Typical view of Projects & Datasets page

Creating a Project

Before the user can perform any action on the Projects & Datasets page, they need access to an existing Project. Projects are listed in the left-hand navigation menu. The user may see only those Projects that relate to them. Click a Project to view a summary list of the Datasets it contains.

To create a new Project, see How to create a Project.

Creating a Dataset

Projects require data in the form of a Dataset. Existing Datasets are listed in the selected Project. Each Dataset has an Edit button that allows users to adjust the information in preparation for publishing the Dataset to the Local Data Catalogue.

To create a Dataset, see How to create a Dataset.

Editing a Dataset

To edit a Dataset:

1. Select a Project from the left-hand navigation menu
2. Click the Edit button corresponding to the Dataset to be edited

The user is then able to edit and publish the selected Dataset via the following pages:

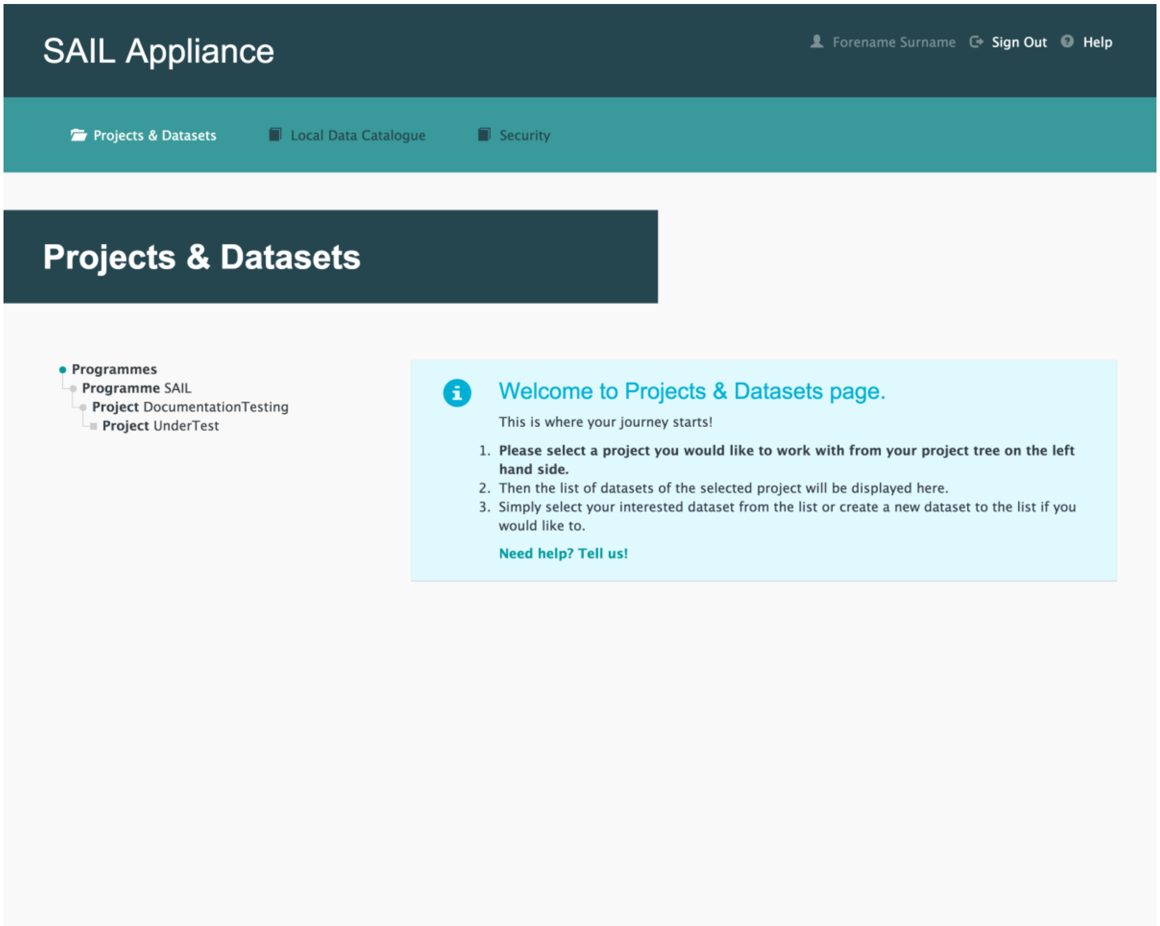
- Dataset Description
- Data Files
- Supporting Files
- Entity Relationship Diagram
- Share Settings
- Pre-Publish

Dataset Description

The first part of the data submission process is the Dataset Description section.

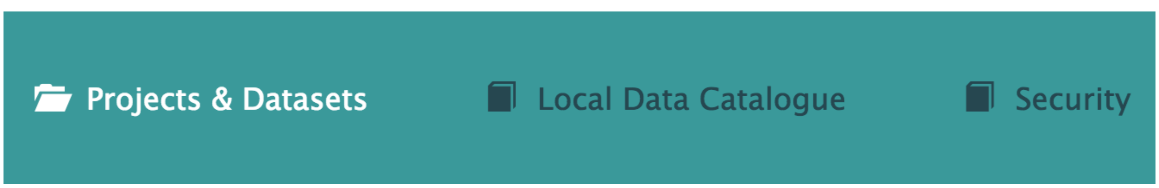
To view this page

1. Log in to the RDA



Default view of RDA user interface

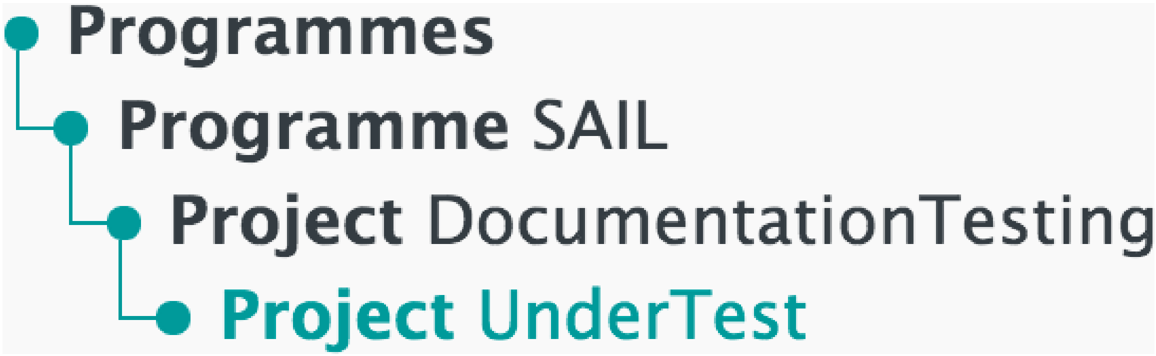
2. Click Projects & Datasets



Projects & Datasets menu item

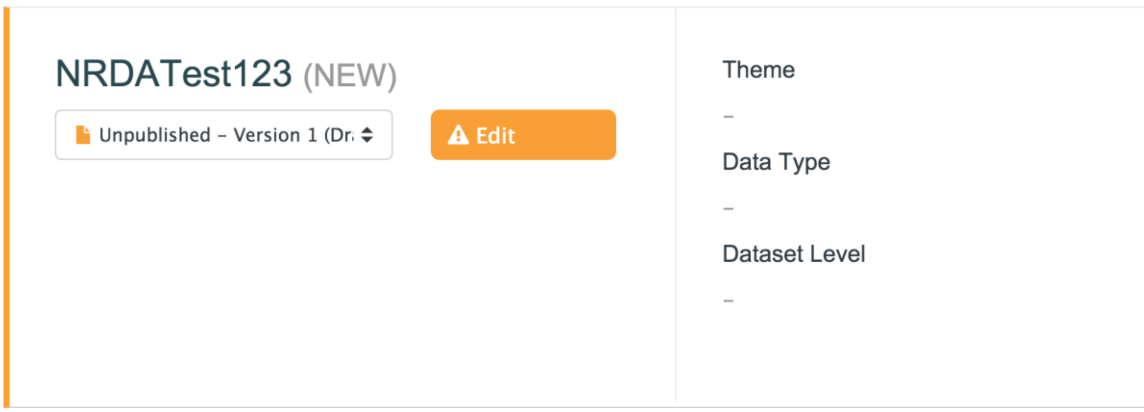
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit



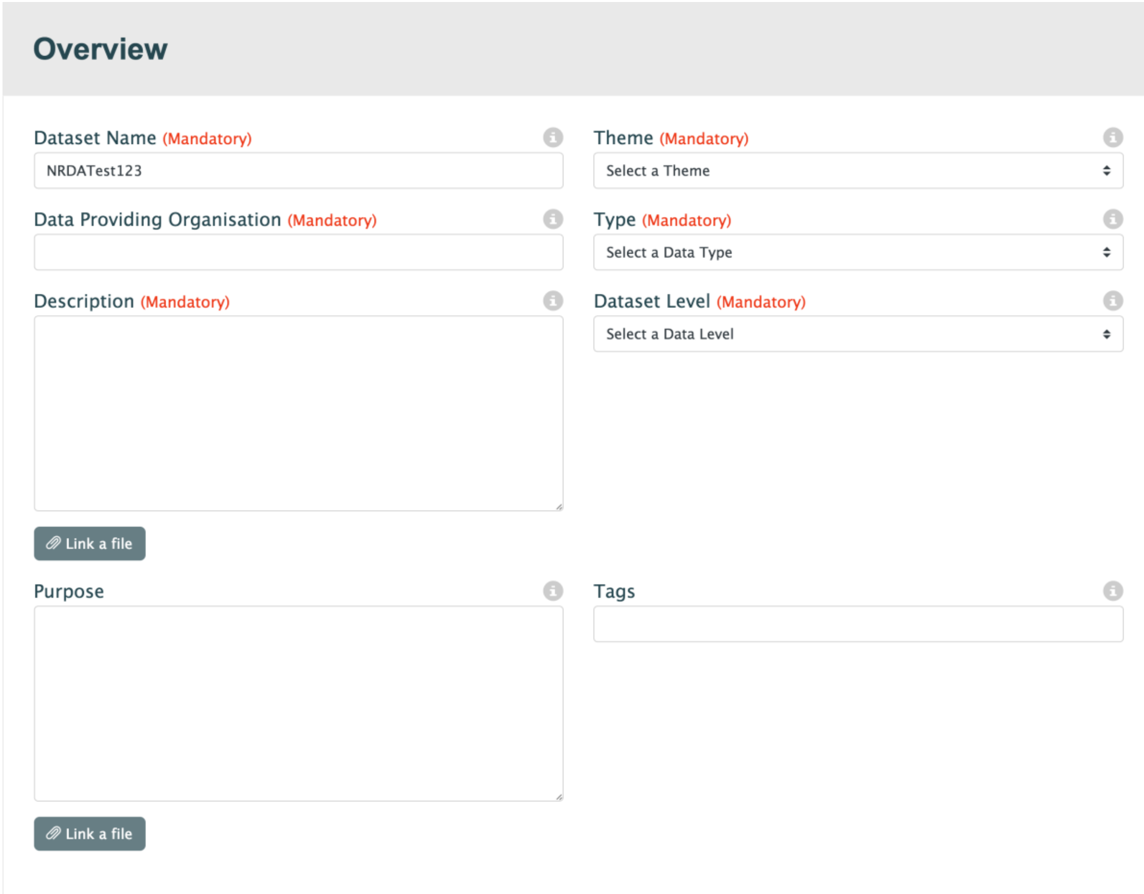
Sample unpublished Dataset

5. Click Dataset Description

Dataset Description menu item

A Dataset cannot be published until all mandatory fields on the Dataset Description page have been completed. See [Pre-Publish](#) for more information.

Overview



Default view of Overview section

Definitions

Dataset Name (Mandatory)

A descriptive name that is relevant to the data it contains. The Dataset Name will be used throughout the Data Catalogue for users to easily identify this Dataset

Theme (Mandatory)

A theme that best describes the majority of the data contained within this Dataset

Data Providing Organisation (Mandatory)

The Data Providing Organisation is the organisation that *owns* the data – not necessarily the organisation that is loading the data

Type (Mandatory)

The type that best describes the majority of the data contained within this Dataset

Description (Mandatory)

A meaningful overview of the data being loaded into this Dataset. This description will appear in the Data Catalogue and should help users quickly determine whether this data is relevant to their research

Dataset Level

The level related to the majority of the data contained within this Dataset

Link a file

Click this button to supply more data

Purpose

Explain why this data was originally collected and what it was intended for

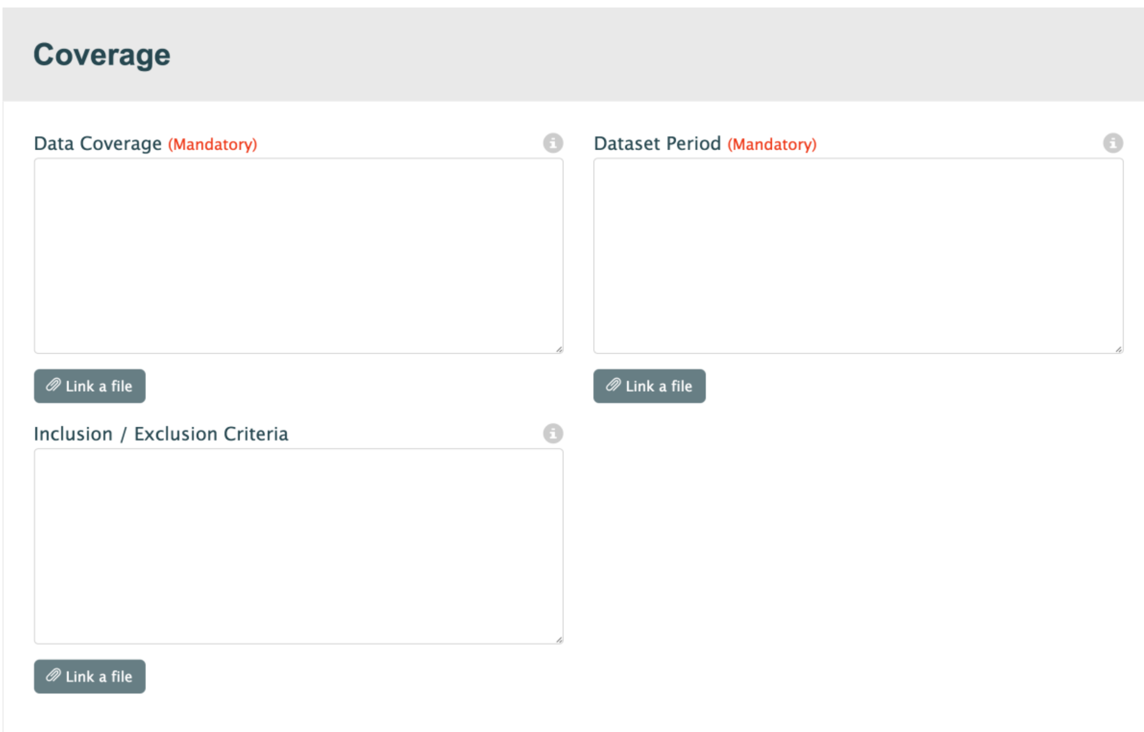
Tags

Used to help users find relevant data when searching in the Data Catalogue. Add as many useful tags as possible, separating each with a comma

Link a file

Click this button to supply more data

Coverage



Default view of Coverage section

Definitions

Data Coverage (Mandatory)

The geographical region in which this data was collected. Data Coverage might be national, regional, a specific town, or even a single postcode. Multiple regions may be included in the description

Dataset Period (Mandatory)

Use to indicate when the collection of this data started, when the data collection ended, and whether the data collection is ongoing

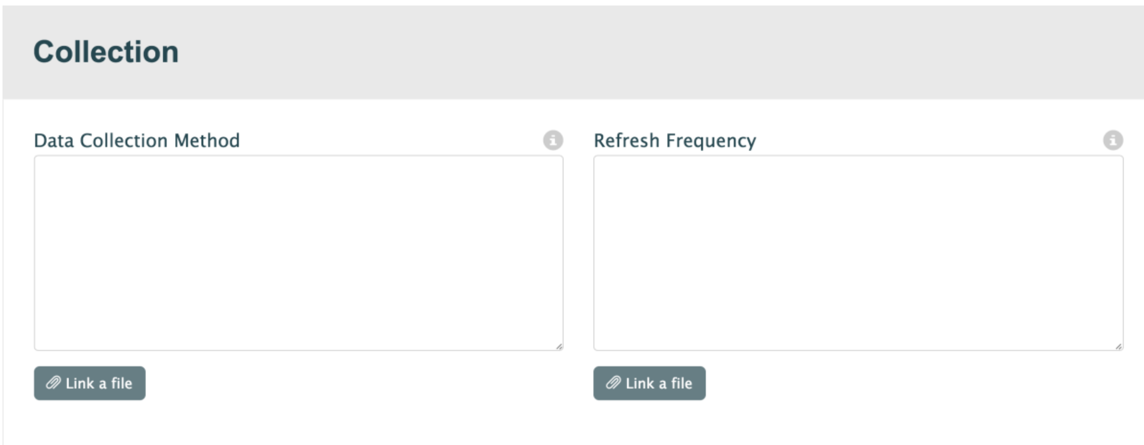
Inclusion / Exclusion Criteria

Details of any conditions that were applied to the collection process, including explanation of why data was or was not included

Link a file

Click this button to supply more data

Collection



Default view of Collection section

Definitions

Data Collection Method

Describe how data was collected, e.g. physical questionnaire, online survey, compilation from existing records, combination of various methods

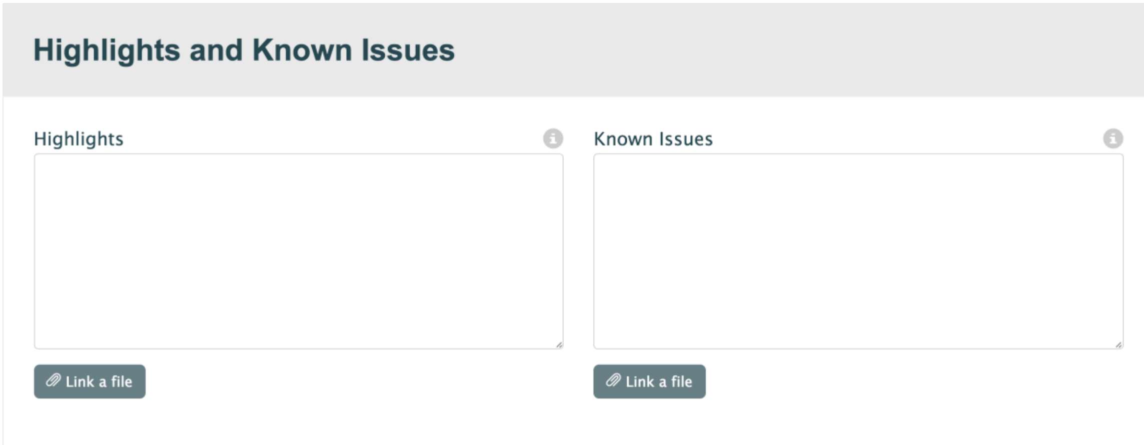
Refresh Frequency

Indicates how often it is expected for new data to be added to this Dataset. This is useful for data that is collected and uploaded on an ongoing basis

Link a file

Click this button to supply more data

Highlights and Known Issues



Default view of Highlights and Known Issues section

Definitions

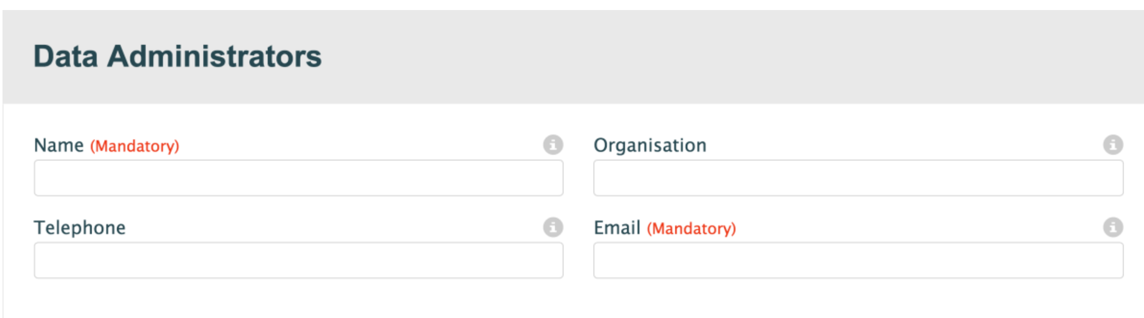
Highlights

Description of any significant events, activities, or findings that can be seen within this data

Known Issues

Details of any known anomalies, inaccuracies, or concerns relating to any of the data included in this Dataset

Data Administrators



Default view of Data Administrators section

Definitions

Name (Mandatory)

Name of the best person to contact with queries relating to this data

Organisation

Organisation responsible for administration of this data. This organisation might be different from the Data Providing Organisation

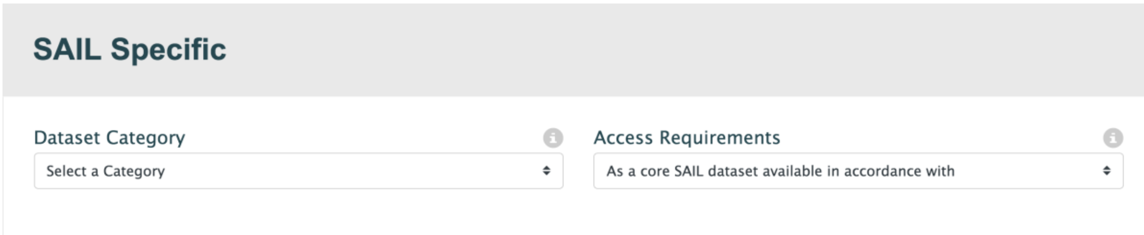
Telephone

Telephone number of the administrative contact for this data. This telephone number will be published with this Dataset in the Data Catalogue

Email (Mandatory)

Email address of the administrative contact for this data. This email address will be published with this Dataset in the Data Catalogue

SAIL Specific



Default view of SAIL Specific section

Definitions

Dataset Category

SAIL-specific field to indicate the category of the Dataset

Access Requirements

SAIL-specific field to indicate the access requirements for the Dataset

A Save Progress button at the bottom of the page allows all changes to be saved.

Next step

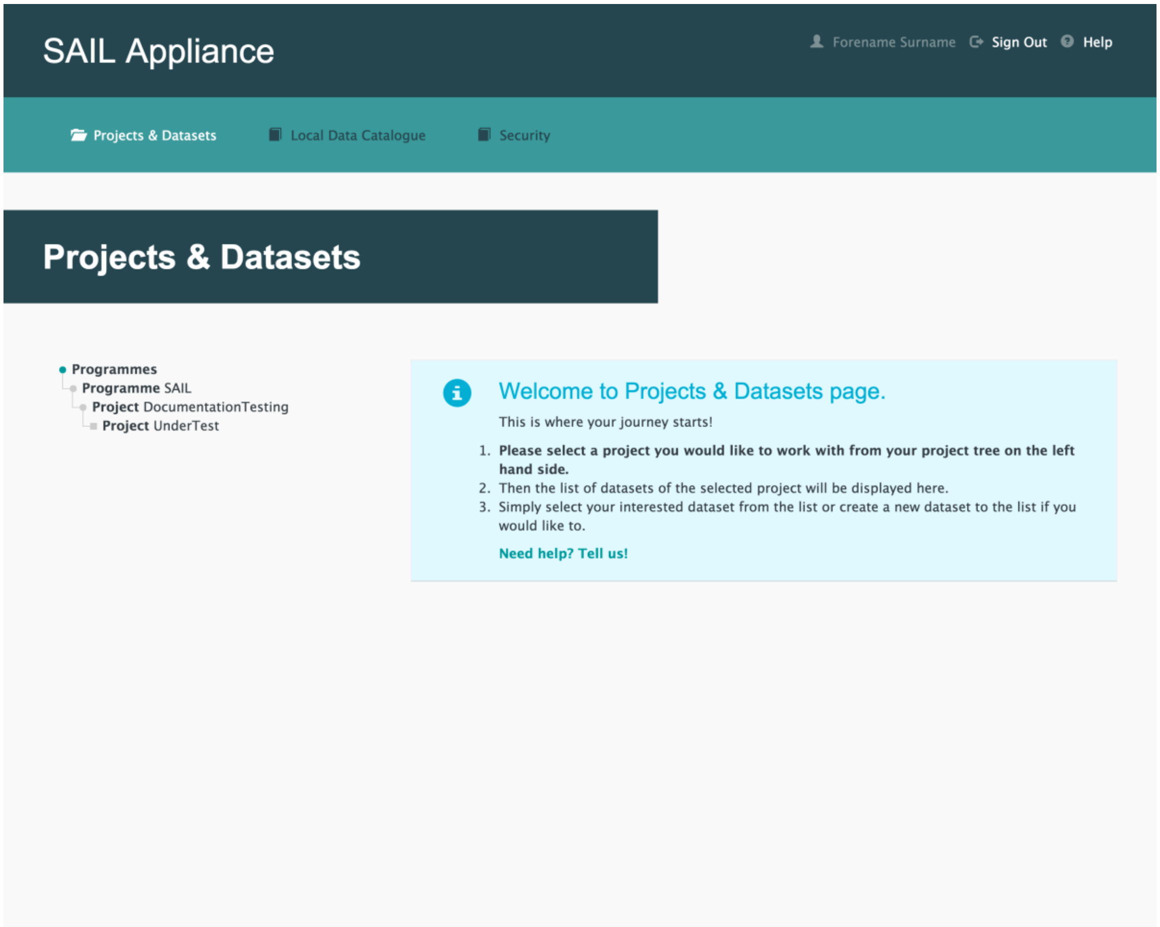
After entering a description for the Dataset, upload the data itself via [Data Files].

Data Files

The Data Files page allows users to upload the data that is the main part of the Dataset. Individual files or entire folders can be uploaded via this page. The data uploaded via this page should be in CSV (comma-separated values) format.

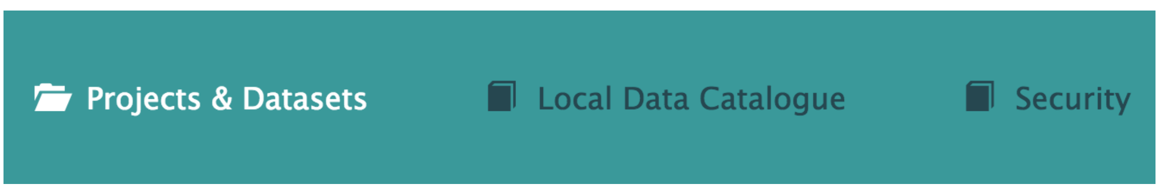
To view this page

1. Log in to the RDA



Default view of RDA user interface

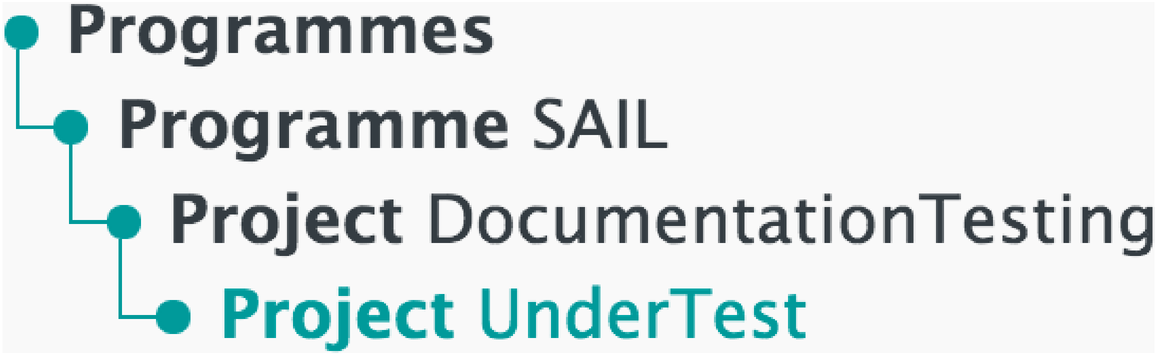
2. Click Projects & Datasets



Projects & Datasets menu item

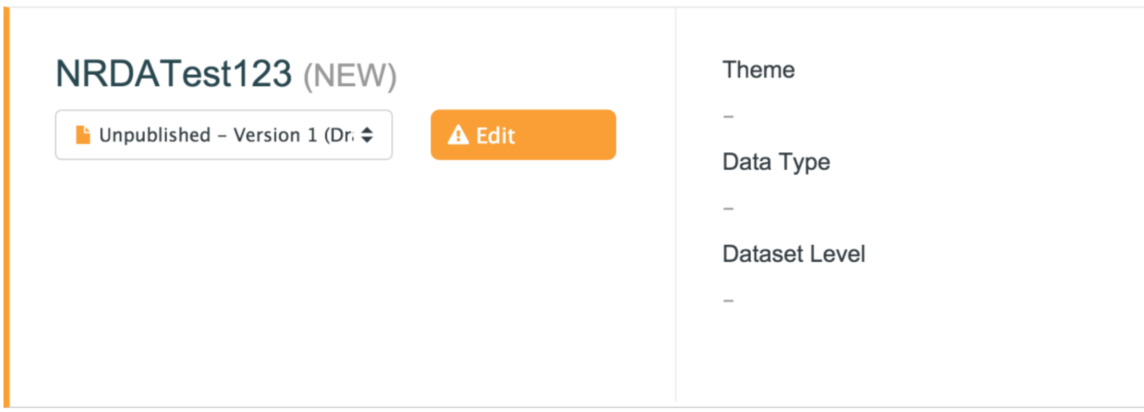
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit



Sample unpublished Dataset

5. Click Data Files

Data Files menu item

Introduction

The default view of the Data Files page is shown below:

Default view of Data Files page with no data added

Definitions

Upload new data file

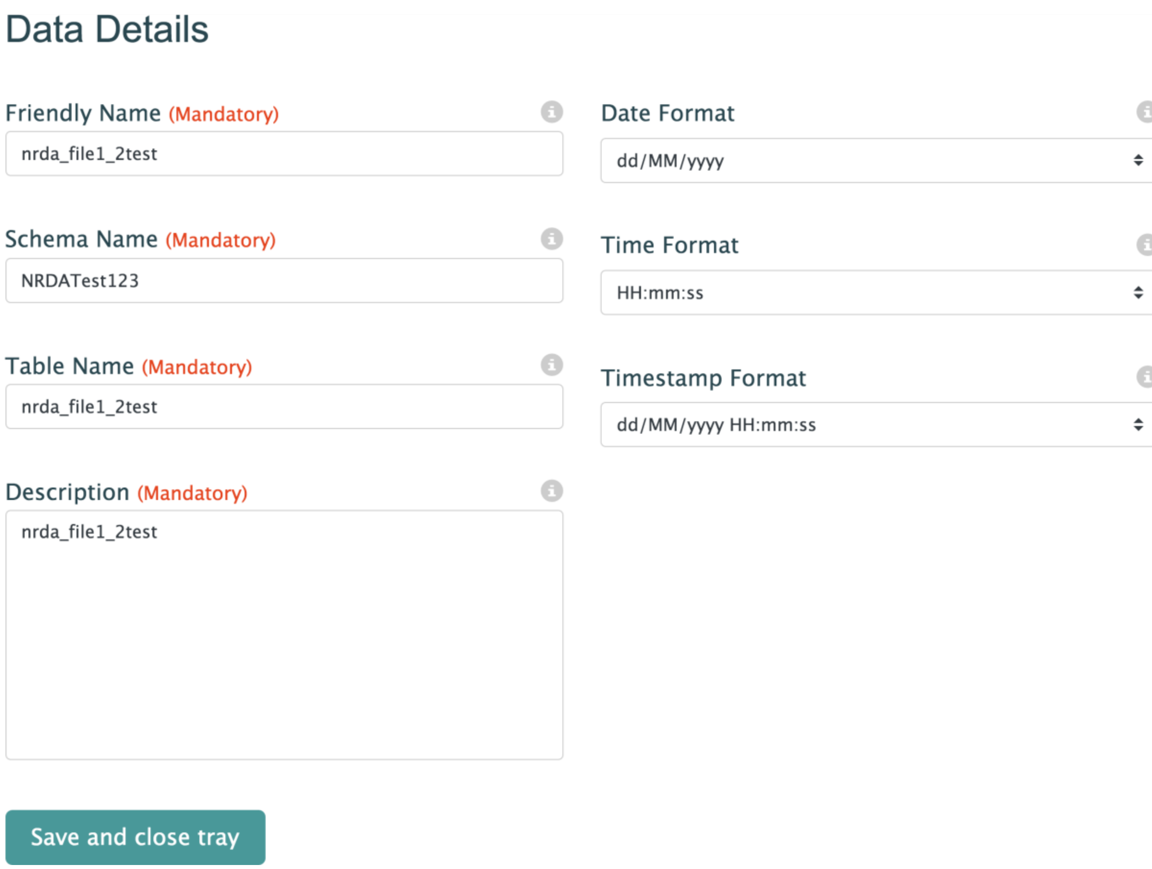
This button allows the user to add data to the Dataset

A Dataset cannot be published until all mandatory fields on the Data Files page have been completed. See Pre-Publish for more information.

To upload data to the Dataset, see How to upload data.

Data Import Settings

Once data has been uploaded, clicking the Data Import Settings link opens the Data Details section. This allows the user to provide more information about the data, as shown below:



Definitions

Friendly Name (Mandatory)

A meaningful name for the data

Date Format

The date format in which the data is to be supplied. The default format is dd/MM/yyyy

Schema Name (Mandatory)

The name of the schema

Time Format

The time format in which the data is to be supplied. The default format is HH:mm:ss

Table Name (Mandatory)

The name of the table

Timestamp Format

The date and time format in which the data is to be supplied. The default format is dd/MM/yyyy HH:mm:ss

Description (Mandatory)

A meaningful description of the data

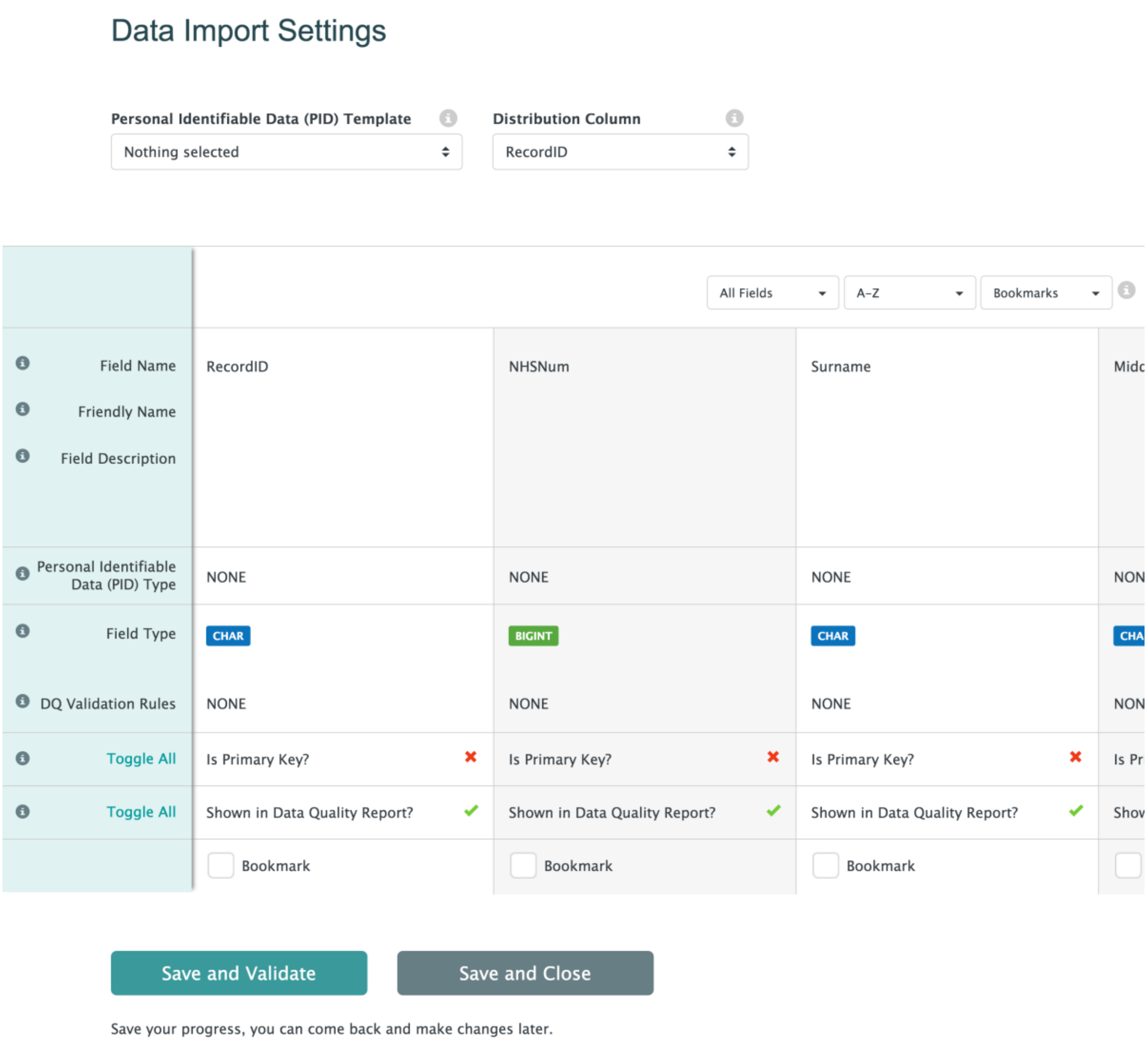
Save and close tray

Click this button to save the settings and hide the Data Import Settings panel

Data Details

Once data has been uploaded, clicking the Data Details link opens the Data Import Settings section. This allows the user to provide more information about the data, as shown below:

Click any column to allow editing of any fields within that column. Only one column may be edited at a time.



Data Import Settings

Definitions

Personal Identifiable Data (PID) Template

Choose a template that matches the Personal Identifiable Data in the uploaded data

Distribution Column

This allows data to be split among the partitions when data is uploaded to SAIL. There should be no need to change the default setting

Field Name

Automatically generated names of fields in the uploaded data. Any spaces in the data are replaced with underscores. The field names can be adjusted, but this should not be necessary

Friendly Name

A meaningful name for the field, which will be useful to a user who is not familiar with the data

Field Description

A short description of the data contained within the field

Personal Identifiable Data (PID) Type

The type of Personal Identifiable Data (if any) in the field. A Personal Identifiable Data Template must be chosen before this field can be edited

Field Type

An automated assessment of the type of data in the field, e.g. CHAR for alphanumeric data of a defined size

DQ Validation Rules

Add validation rules to confirm that the data is imported correctly

More info

- **NONE** – Default if no DQ rule is given
- **Range** – If the data should fall between two values, then specify the Min and Max values and this field's data will be validated during publish. Validation errors will be reported in the Data Quality Report. For numeric, date, time and datetime data types only
- **Local Lookup** – validate all the data of selected field against a temporary lookup table. All the valid values for the data field should be added in the local lookup table section. Any value of the field that cannot be found in the table is marked as invalid in the Data Quality Report. This option is recommended for use if a small number of valid values are dedicated to a certain field
- **Reference Table** – validate all the data of the selected field against certain values in a database lookup table by specifying the lookup table dataset name, lookup table name, and the lookup column name. Those values from the DB lookup table should contain all the valid values for that data field. Any value of the field that cannot be found in the lookup table is marked as invalid in the Data Quality Report

Primary Key

Tick this box to show that the field contains a unique identifier, e.g. an email address. More than one field may be marked as a Primary Key

Show in Data Quality Report

Tick this box to include the field in the Data Quality Report. Fields that are not relevant should be excluded

Bookmark

Tick this box to mark the field as a bookmark

Save and Validate

Click this button to save the changes and validate the data. The Pre-Publish process cannot proceed until all data has been validated

Save and Close

Click this button to save the changes and close the Data Details panel without attempting to validate the data

Next step

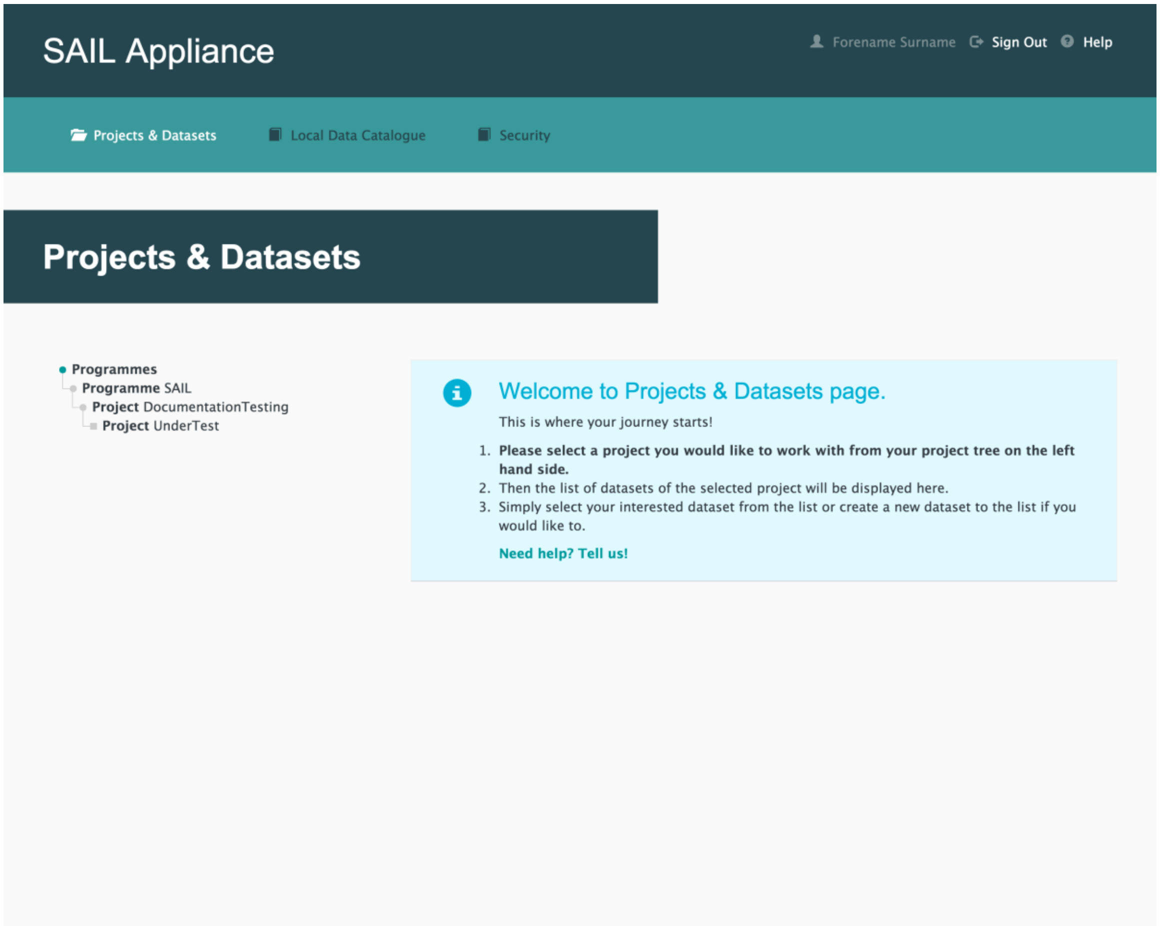
After uploading and validating the data, add any Supporting Files.

Supporting Files

The Supporting Files page is used to upload information that supports the main data in the Dataset. This information can come in the form of text files, Word documents, PDFs, or any other common document format.

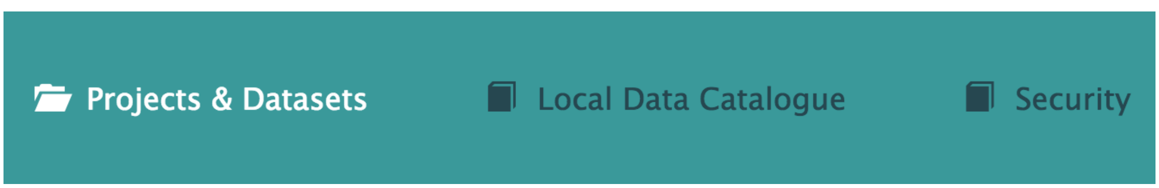
To view this page

1. Log in to the RDA



Default view of RDA user interface

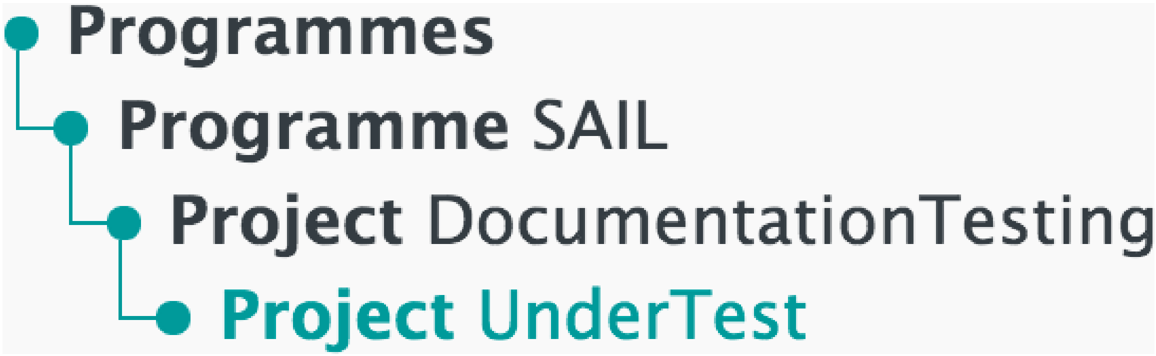
2. Click Projects & Datasets



Projects & Datasets menu item

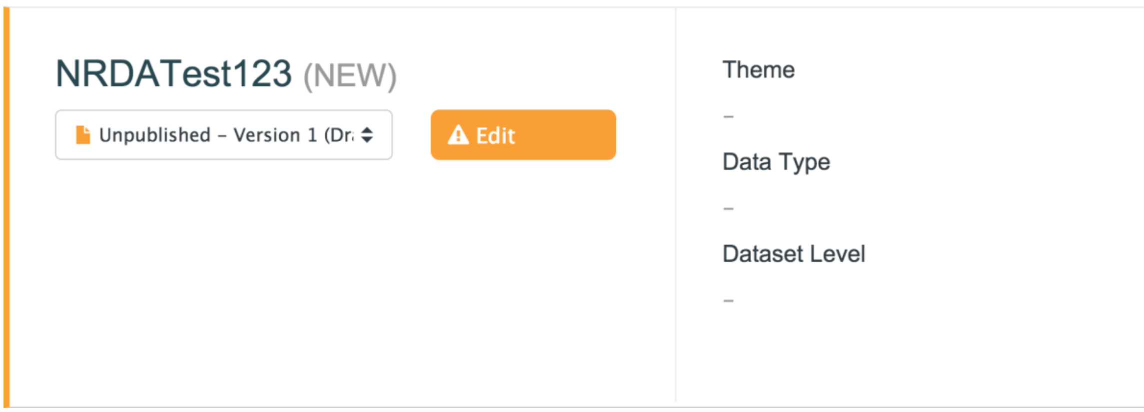
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit



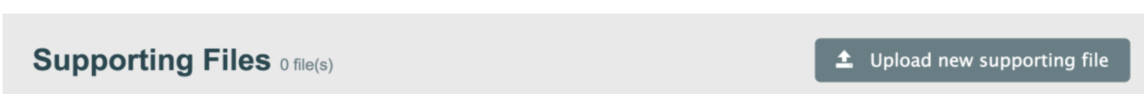
Sample unpublished Dataset

5. Click Supporting Files

Supporting Files menu item

Default view

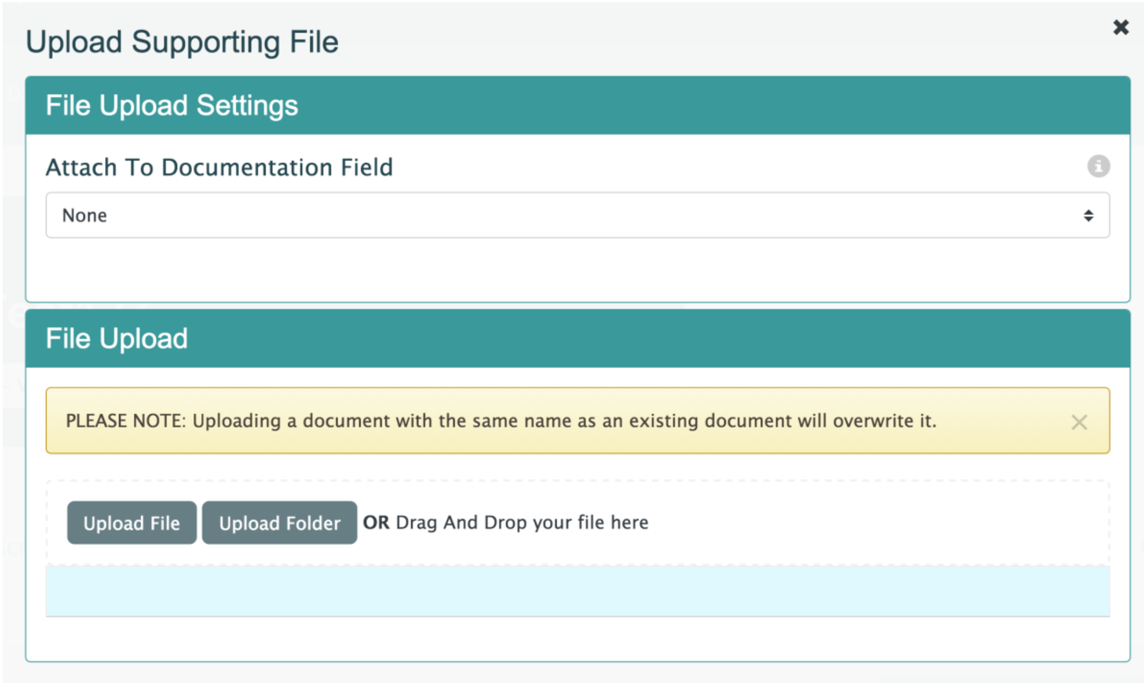
The default view of the Supporting Files is shown below:



Default view of Supporting Files page

Upload Supporting Files panel

The Upload Supporting Files panel allows users to upload supporting files and folders. An example is shown below:



Default view of Supporting Files page

Attach To Documentation Field

The field the supporting file should be associated with

Upload File

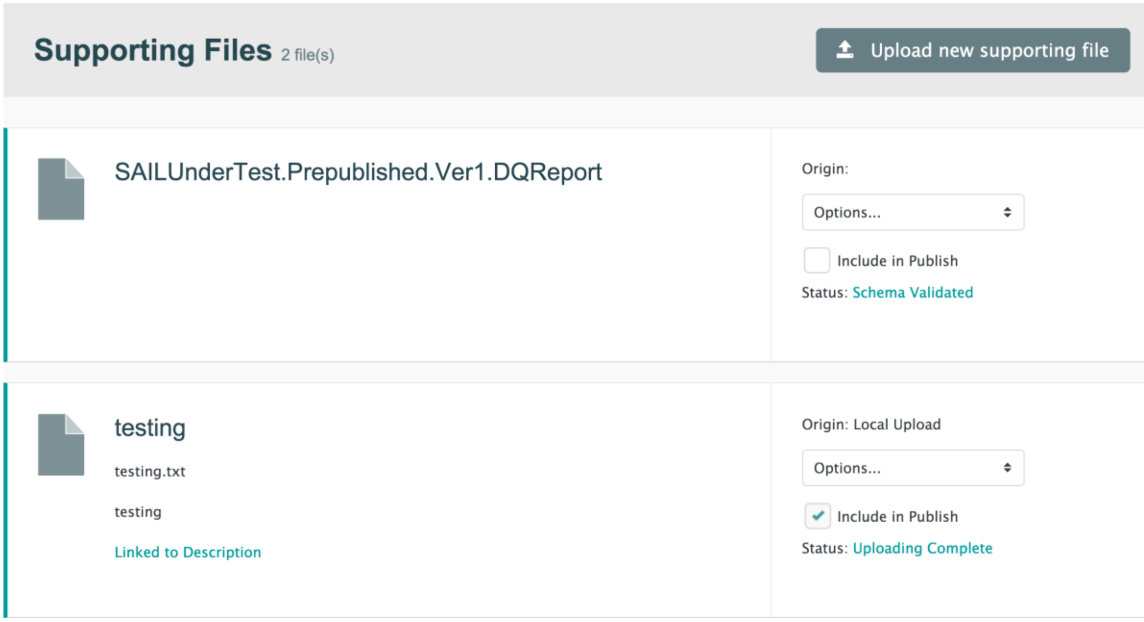
Click this button to upload a supporting file. Alternatively, click and drag a file to the File Upload section to directly upload it

Upload Folder

Click this button to upload a supporting folder. Alternatively, click and drag a file to the File Upload section to directly upload it

Supporting Files uploaded

When supporting files have been uploaded, the Supporting Files page looks like the example shown below:



Default view of Supporting Files page

Description

A description of the content of the supporting file, including a link to any section to which the supporting file has been assigned

Origin

The source of the uploaded file or folder, e.g. Local Upload

Options…

The following options are available for the selected file or folder:

- **Validate Schema** – check and validate the schema for the data. The Dataset cannot be published until the schema is validated
- **Update** – refresh the uploaded file or folder with new data
- **Download** – download a copy of the file or folder
- **Remove** – remove the file or folder from the Dataset

Include in Publish

Tick this box to include the data in the published Dataset. Once published, the content will be available in the Local Data Catalogue

Status

The status of the file or folder, e.g. Schema Created, Uploading Complete

Next step

Once the data files have been uploaded, check the [Entity Relationship Diagram](#).

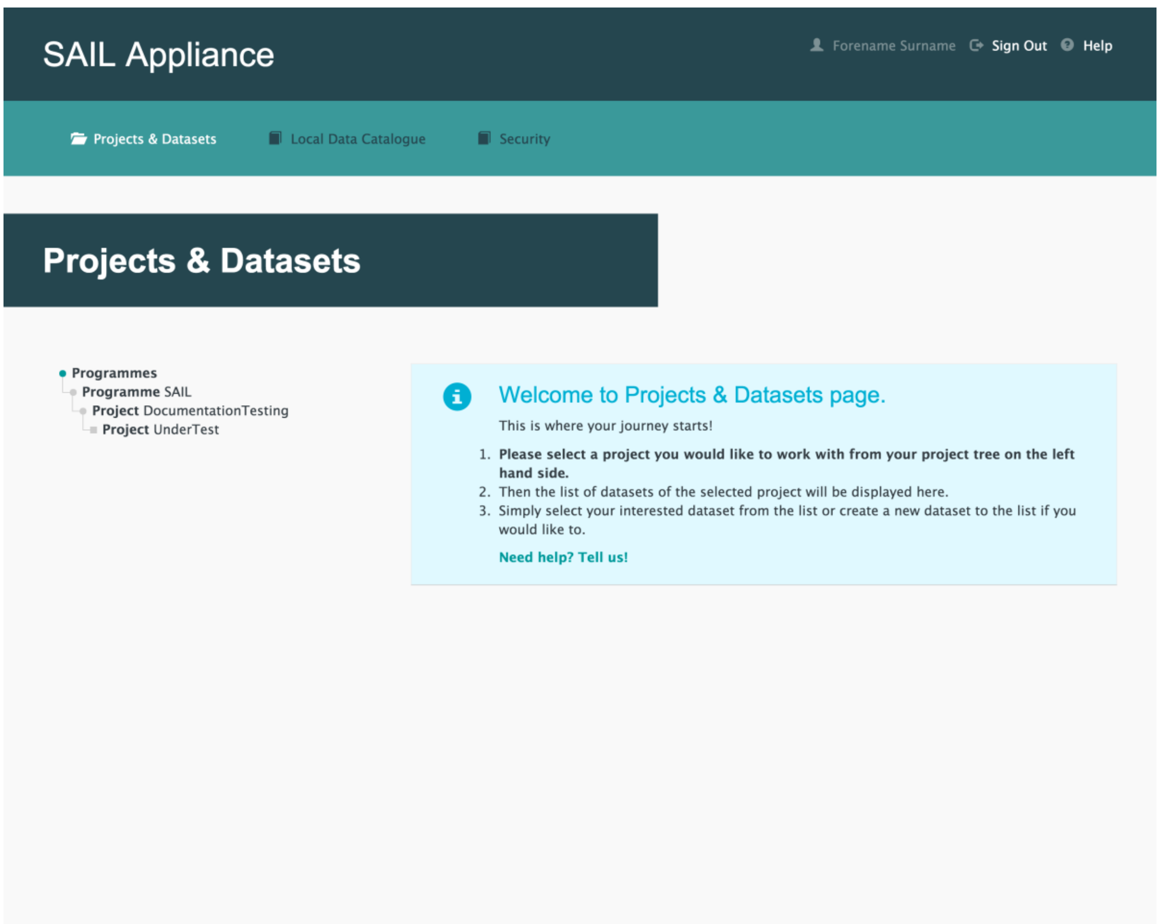
Entity Relationship Diagram

The Entity Relationship Diagram shows a visual representation of the data that is to be published.

The diagram is automatically generated based on the contents of the Dataset added through the Data Files page.

To view this page

1. Log in to the RDA



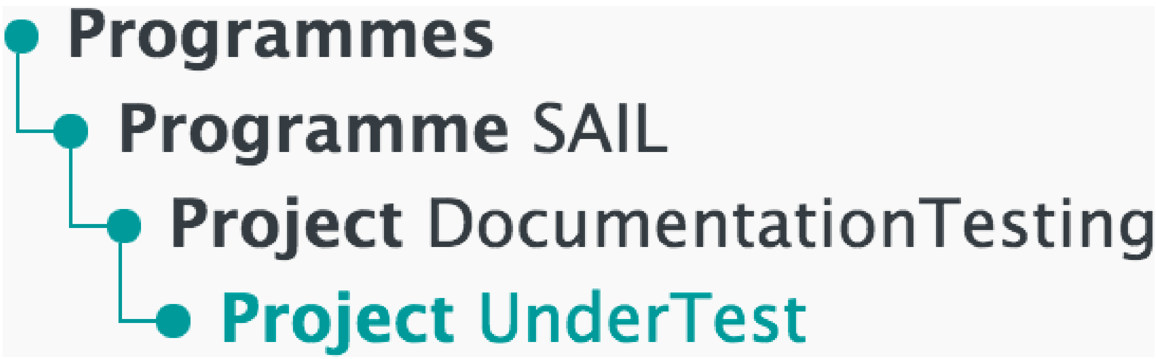
Default view of RDA user interface

2. Click Projects & Datasets

Projects & Datasets menu item

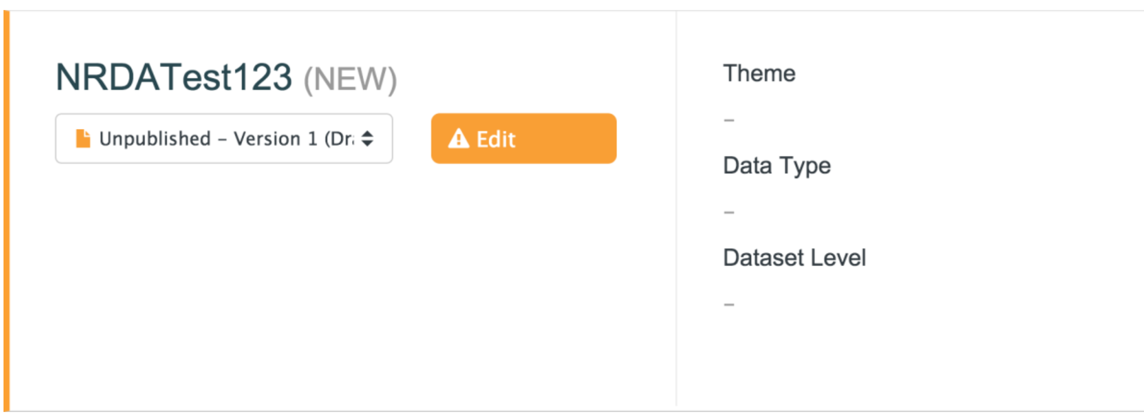
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit



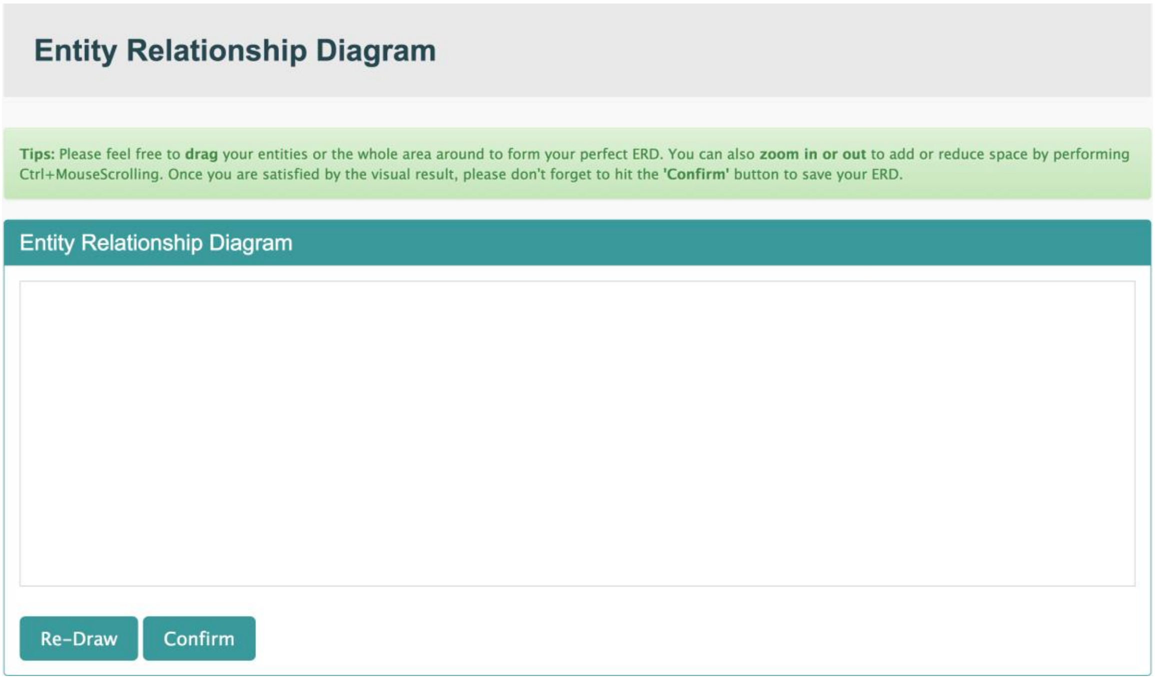
Sample unpublished Dataset

5. Click Entity Relationship Diagram

Entity Relationship Diagram menu item

Introduction

A Dataset cannot be published until its Entity Relationship Diagram has been confirmed. See Pre-Publish for more information.



Empty Entity Relationship Diagram (no data uploaded)

Definitions

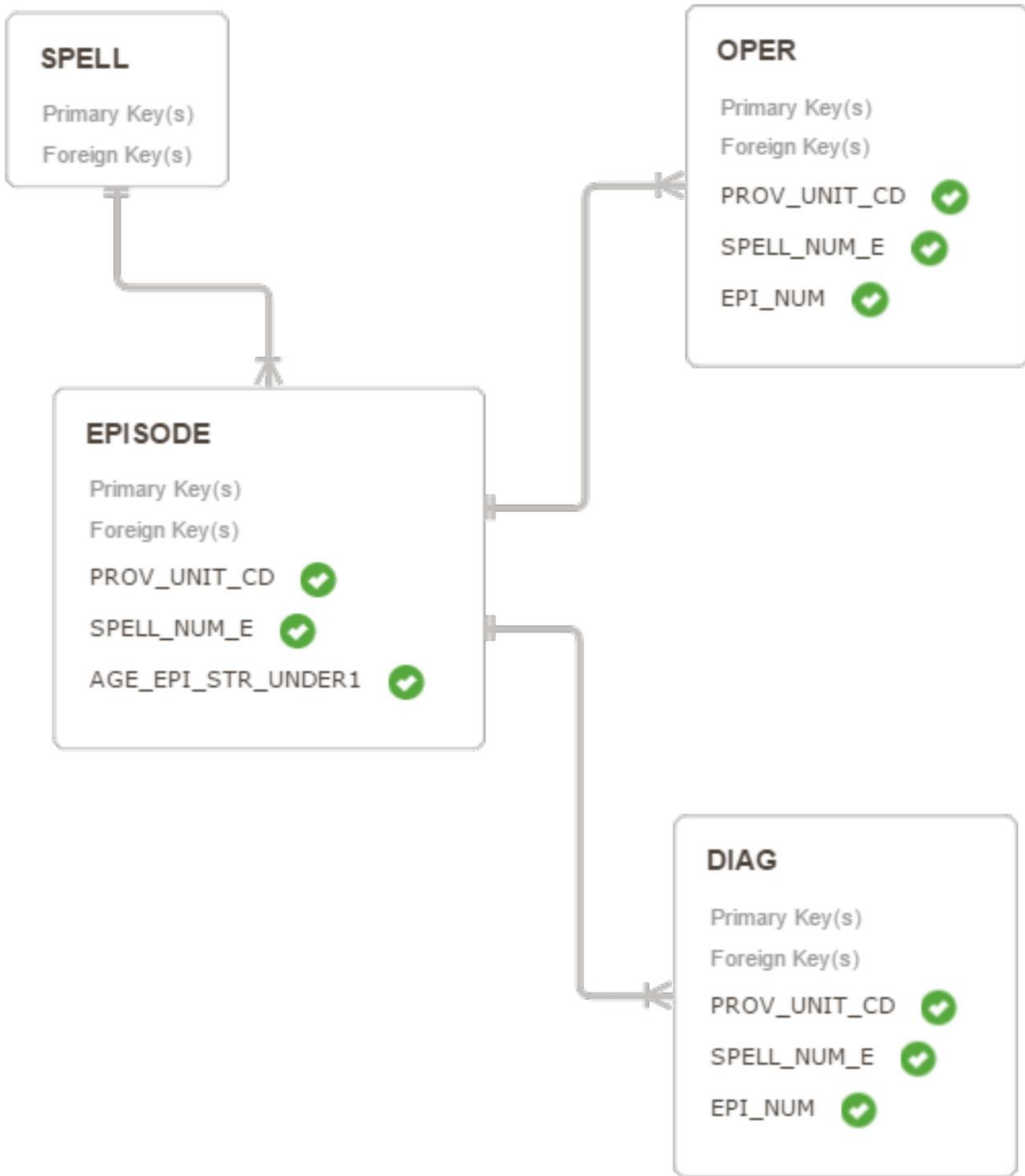
Re-Draw

Adjust the Entity Relationship Diagram

Confirm

Confirm that the Entity Relationship Diagram is accurate

An example of an Entity Relationship Diagram is shown below:



Sample Entity Relationship Diagram

If the diagram appears correct, click Confirm. The button will disappear once clicked.

To make changes, click Re-Draw, adjust the diagram, and then click Confirm.

Next step

Once the Entity Relationship Diagram has been confirmed, check the [Share Settings](#).

Share Settings

The Share Settings page allows users to create Share Profiles.

A Share Profile defines which parts of the data are shared and which organisations have access to it. Users can create multiple Share Profiles to control exactly what is shared with each organisation.

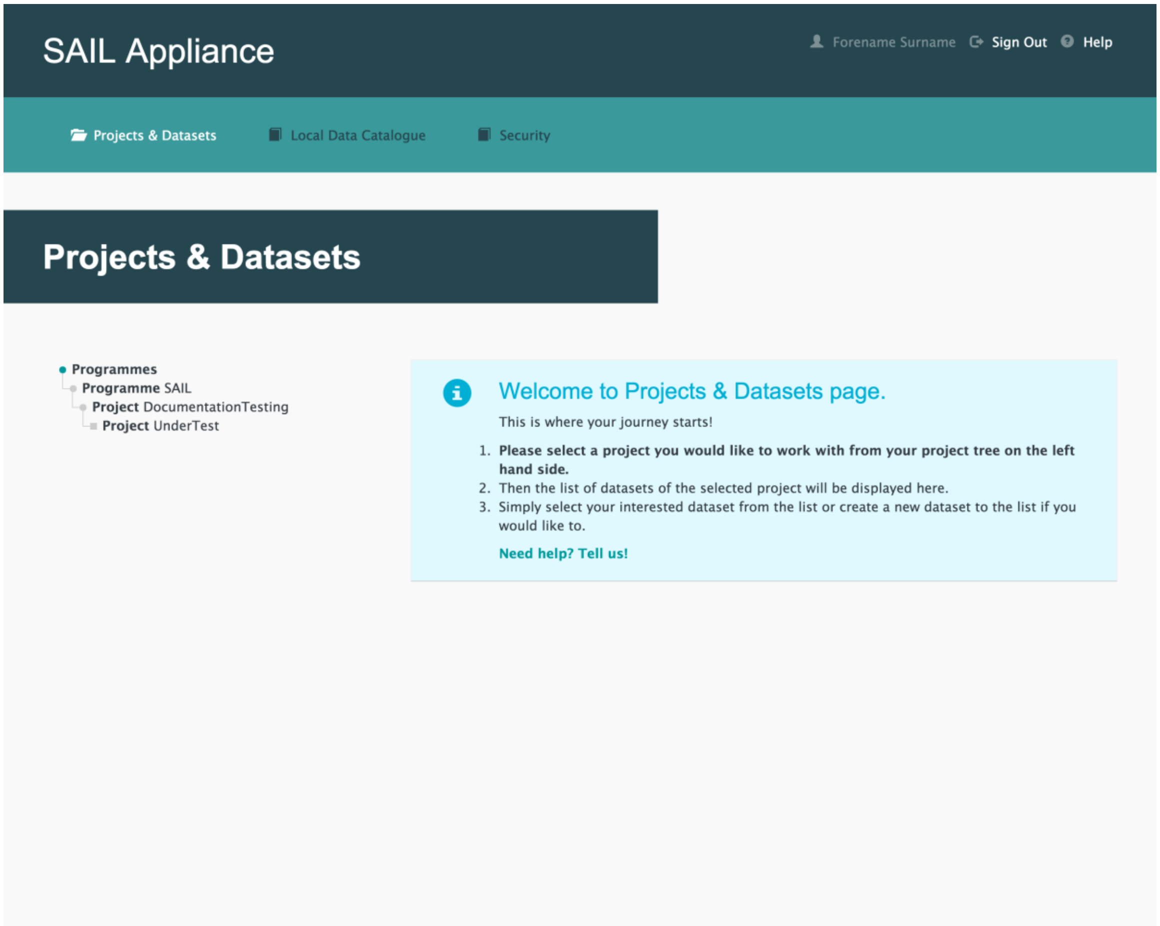
When a Dataset is published, the RDA creates a unique Publish ID. To access the published data, the recipient needs the following:

- An Appliance
- A Receive Profile
- The Publish ID of the desired Dataset

A Share Profile can be created only after data has been uploaded and validated.

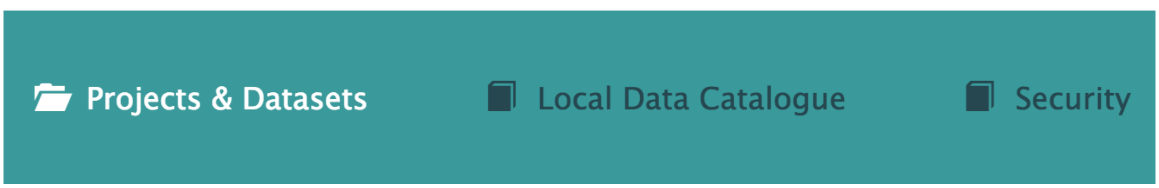
To view this page

1. Log in to the RDA



Default view of RDA user interface

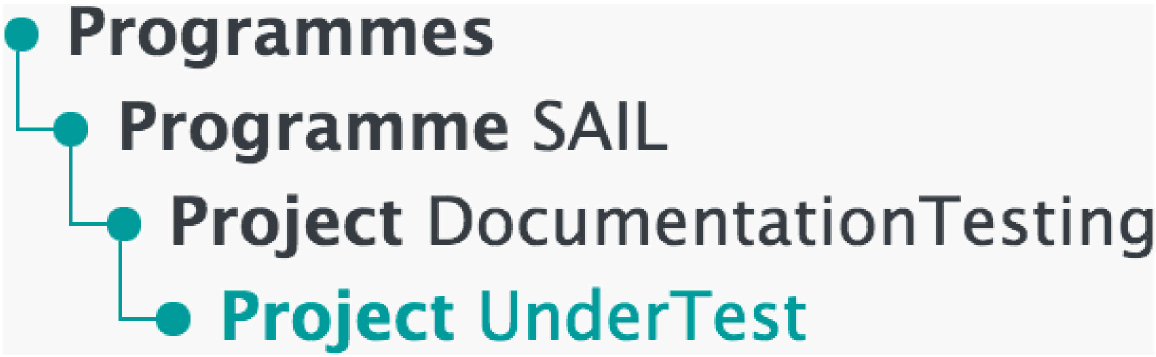
2. Click Projects & Datasets



Projects & Datasets menu item

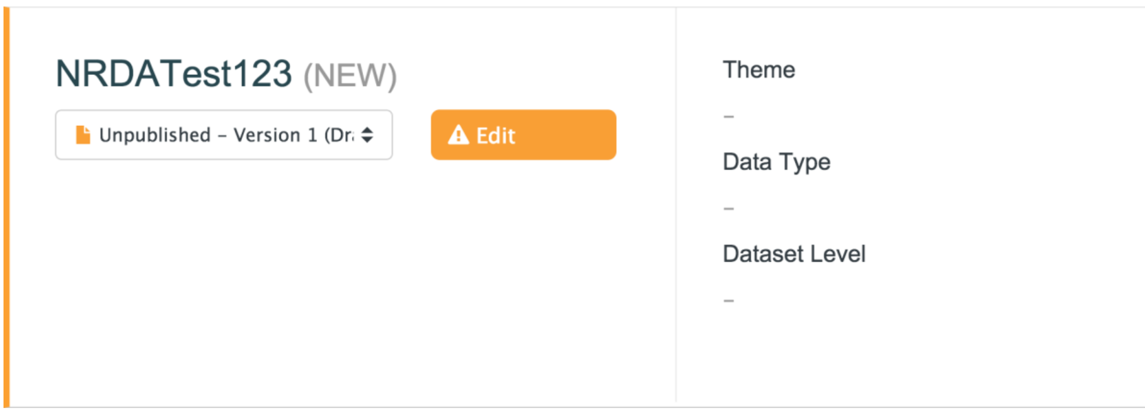
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

4. Click Edit

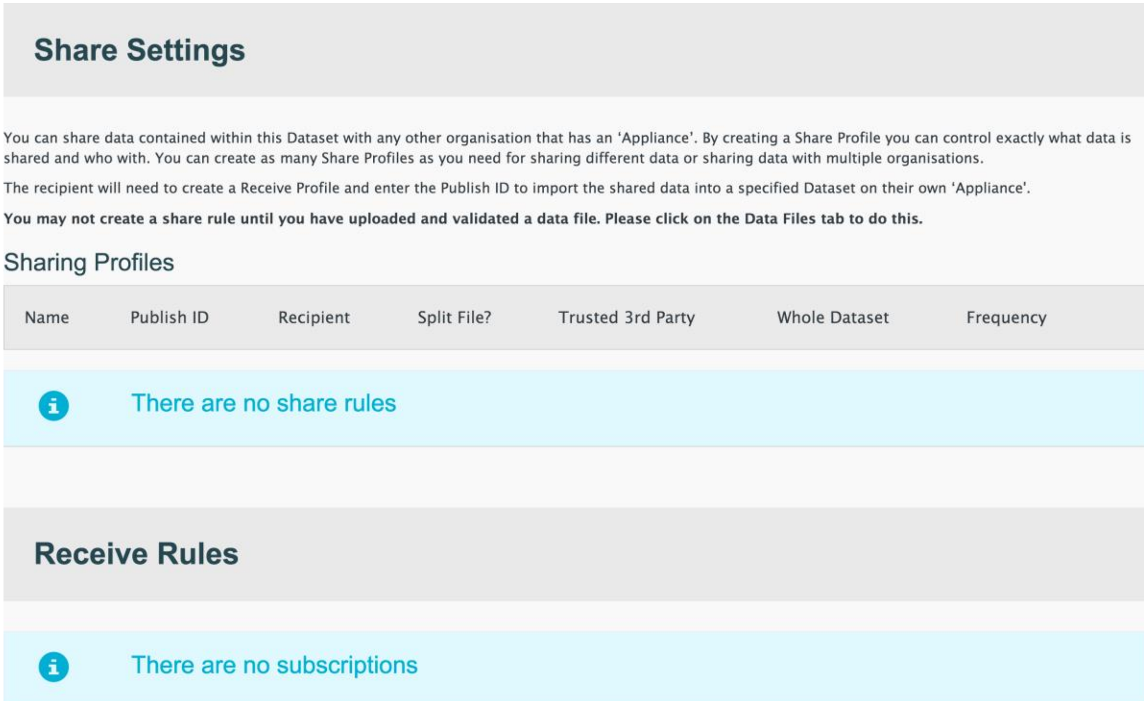


Sample unpublished Dataset

5. Click Share Settings

Share Settings menu item

An example of the default Share Settings page is shown below:



Default Share Settings page

Next step

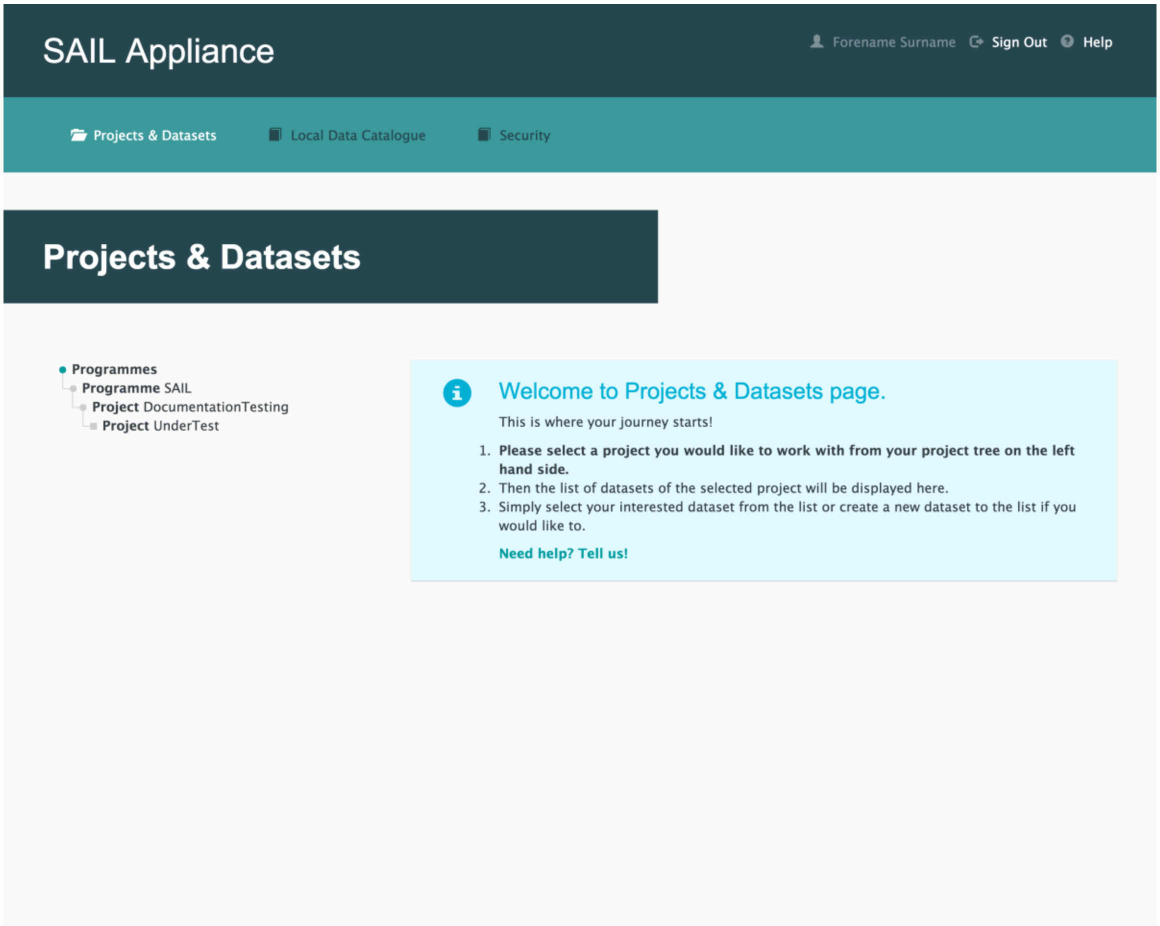
Once the Share Settings have been checked, move on to [Pre-Publish](). This is the last step before the Dataset is published to the [Local Data Catalogue]().

Pre-Publish

The Pre-Publish page shows the readiness of the Dataset for publishing.

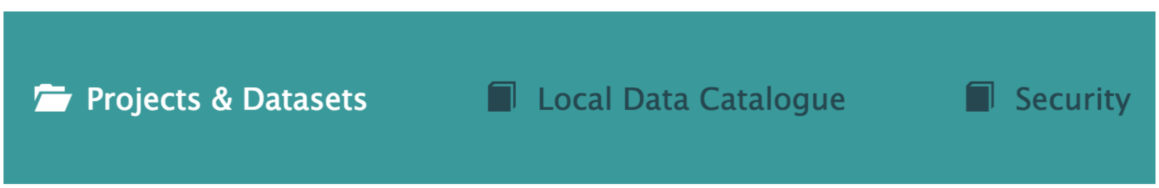
To view this page

1. Log in to the RDA



Default view of RDA user interface

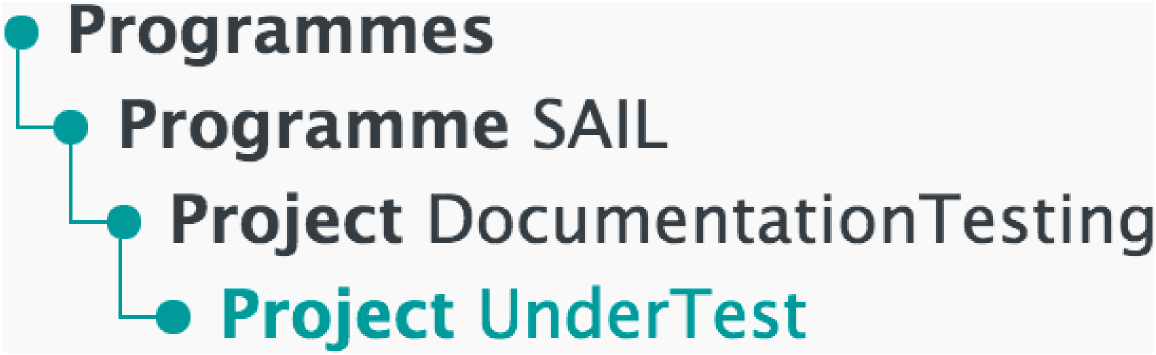
2. Click Projects & Datasets



Projects & Datasets menu item

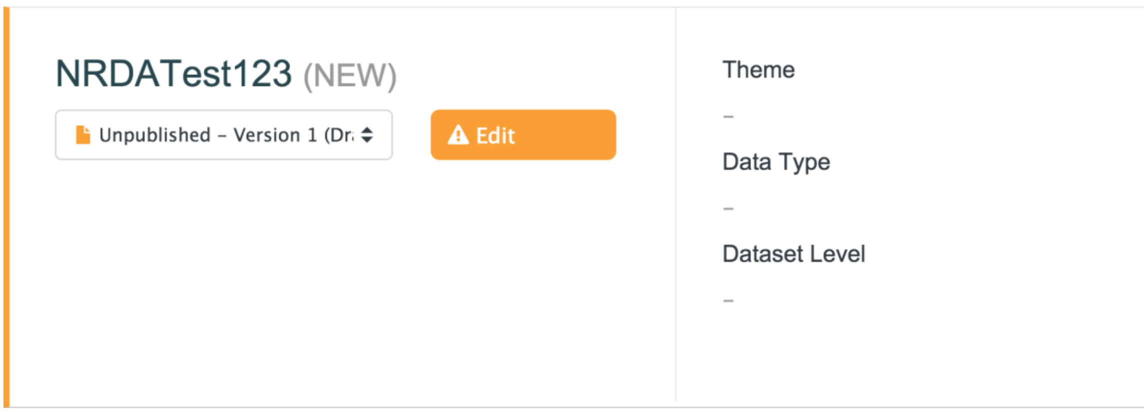
The Projects & Datasets section is selected by default.

3. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

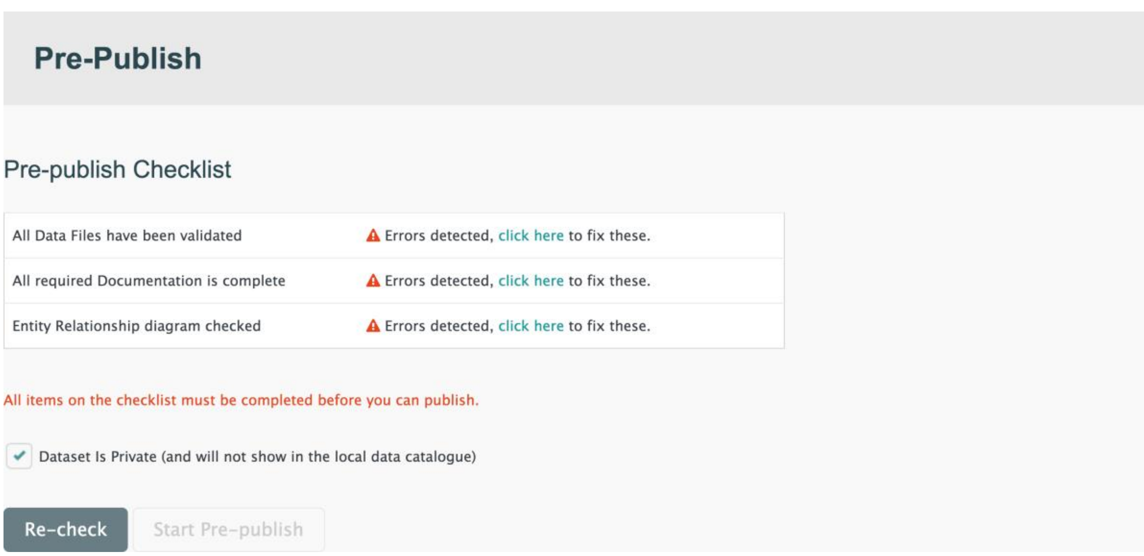
4. Click Edit



Sample unpublished Dataset

5. Click Pre-Publish

Pre-Publish menu item



Default view of Pre-Publish page

Definitions

Dataset Is Private

Tick this box to exclude the Dataset from the Local Data Catalogue

Re-check

Click this button to check the data

Start Pre-publish

Click this button to start the pre-publishing process. The button cannot be clicked until all pre-publishing checks have been successfully completed
Further confirmation is required before any data is published.

Click Start Pre-publish to start the pre-publishing process.

Checklist item: All Data Files have been validated

To check this item:

1. Go to the [Data Files](#) page
2. Confirm that the data is correct
3. Click Save and Validate

Checklist item: All required Documentation is complete

To check this item:

1. Go to the [Dataset Description](#) page
2. Confirm that the data is correct and that all mandatory fields have been completed
3. Click Save Progress

Checklist item: Entity Relationship diagram checked

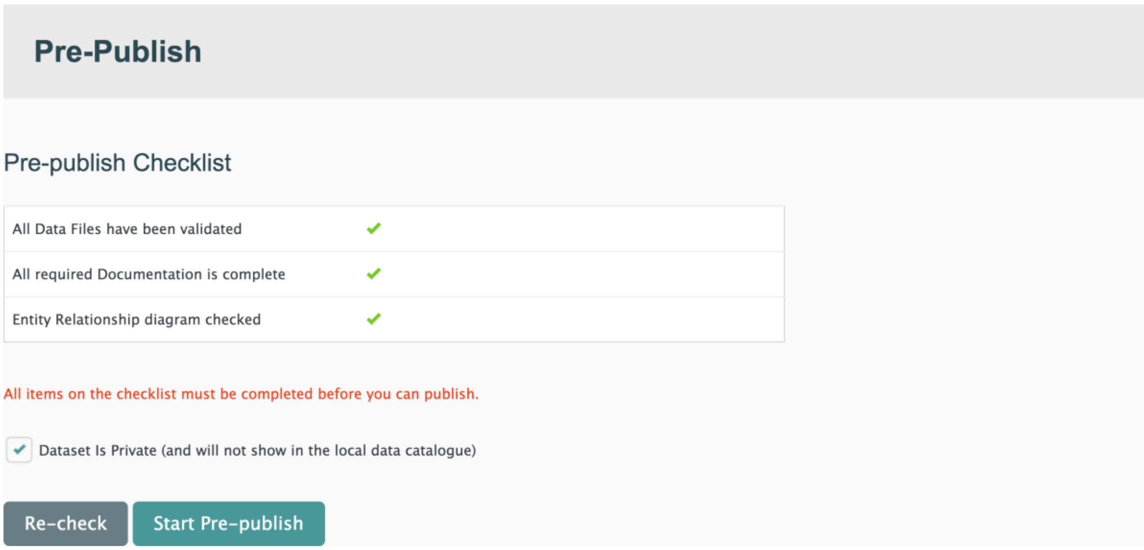
To check this item:

1. Go to the [Entity Relationship Diagram](#) page
2. Confirm that the diagram is correct
3. Click Confirm

Start pre-publish

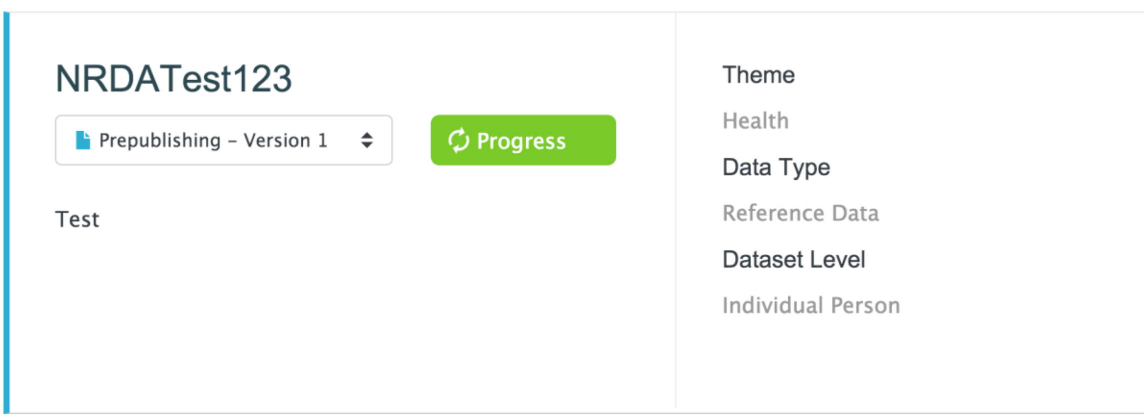
The Dataset can be published as soon as all data has been uploaded and successfully checked.

Click Start Pre-publish to begin the process.



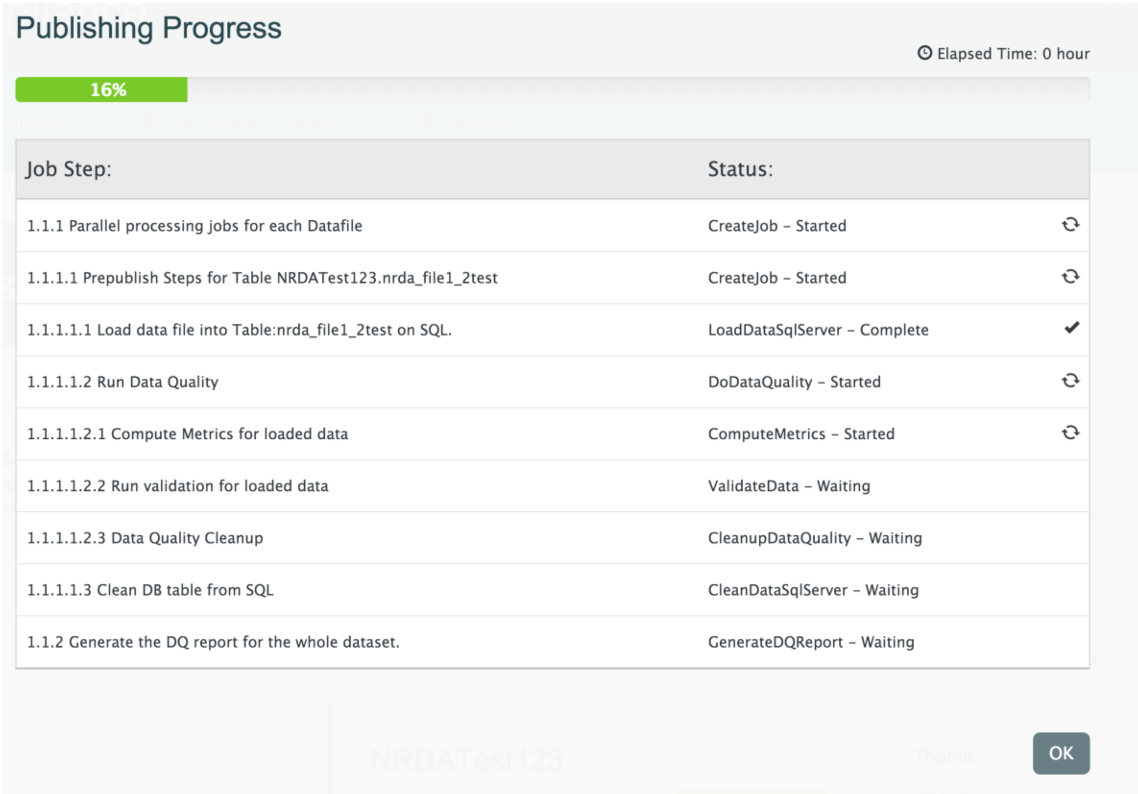
All checklist items are ticked and the pre-publish process can proceed

The Projects & Datasets page is shown and an animated Progress button is displayed next to the current Project.



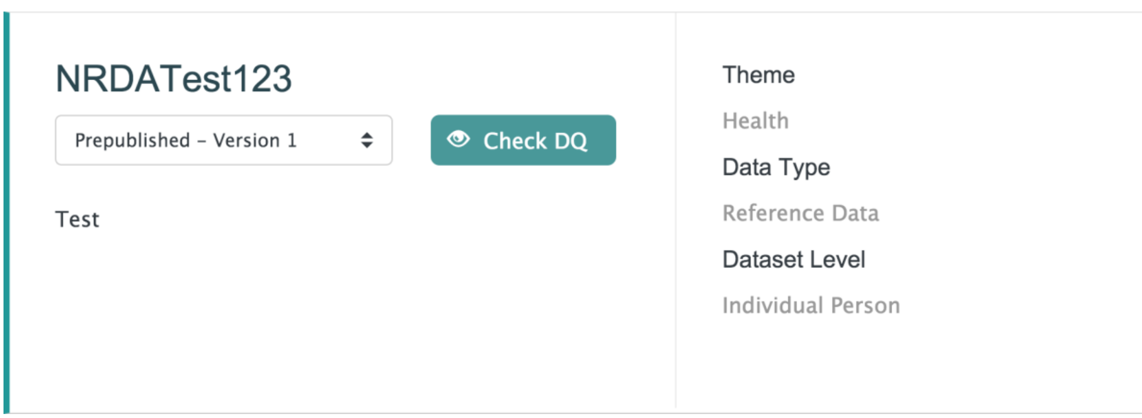
Pre-publish in progress

Click Progress to see details about the pre-publishing process. A progress bar and series of job steps is shown.



Pre-publishing progress details

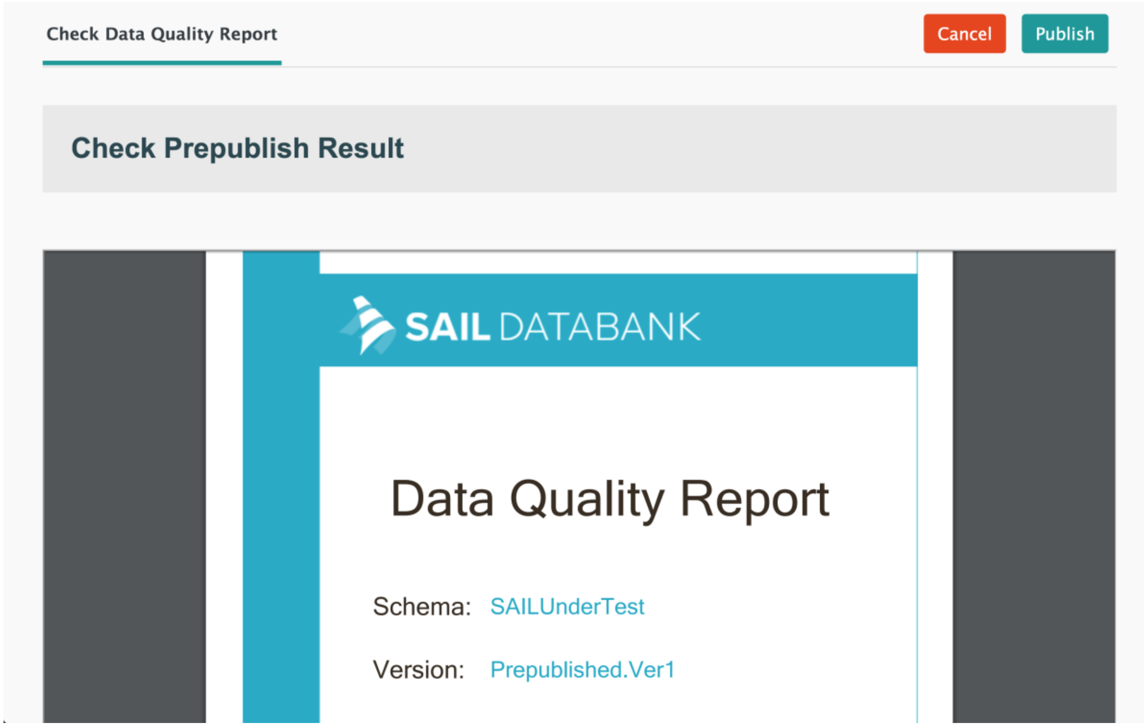
When the pre-publishing process is complete, the Progress button will change to Check DQ.



Pre-publishing process complete

Click Check DQ to view the Data Quality Report.

The Data Quality Report appears in the Check Prepublish Result section of the Check Data Quality Report page, as shown below:



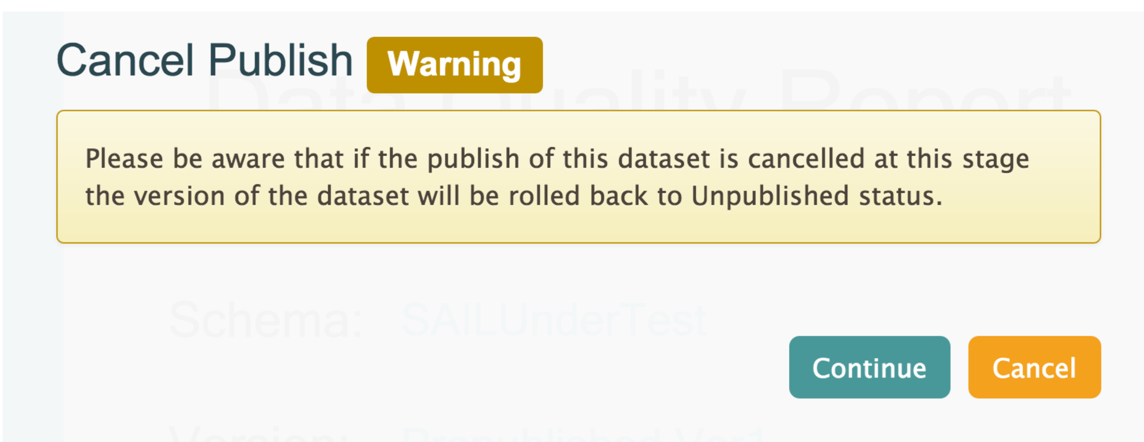
Data Quality Report

Definitions

The Check Data Quality Report page contains the following buttons:

Cancel

Clicking the Cancel button displays a warning to confirm that cancelling will return the Dataset to the Unpublished state.



Click Continue to return the Dataset to the Unpublished state

Click Continue to return the Dataset to the Unpublished state or click Cancel again to leave the Dataset ready to be published.

Publish

Complete the publishing process and add the Dataset to the Local Data Catalogue

Next step

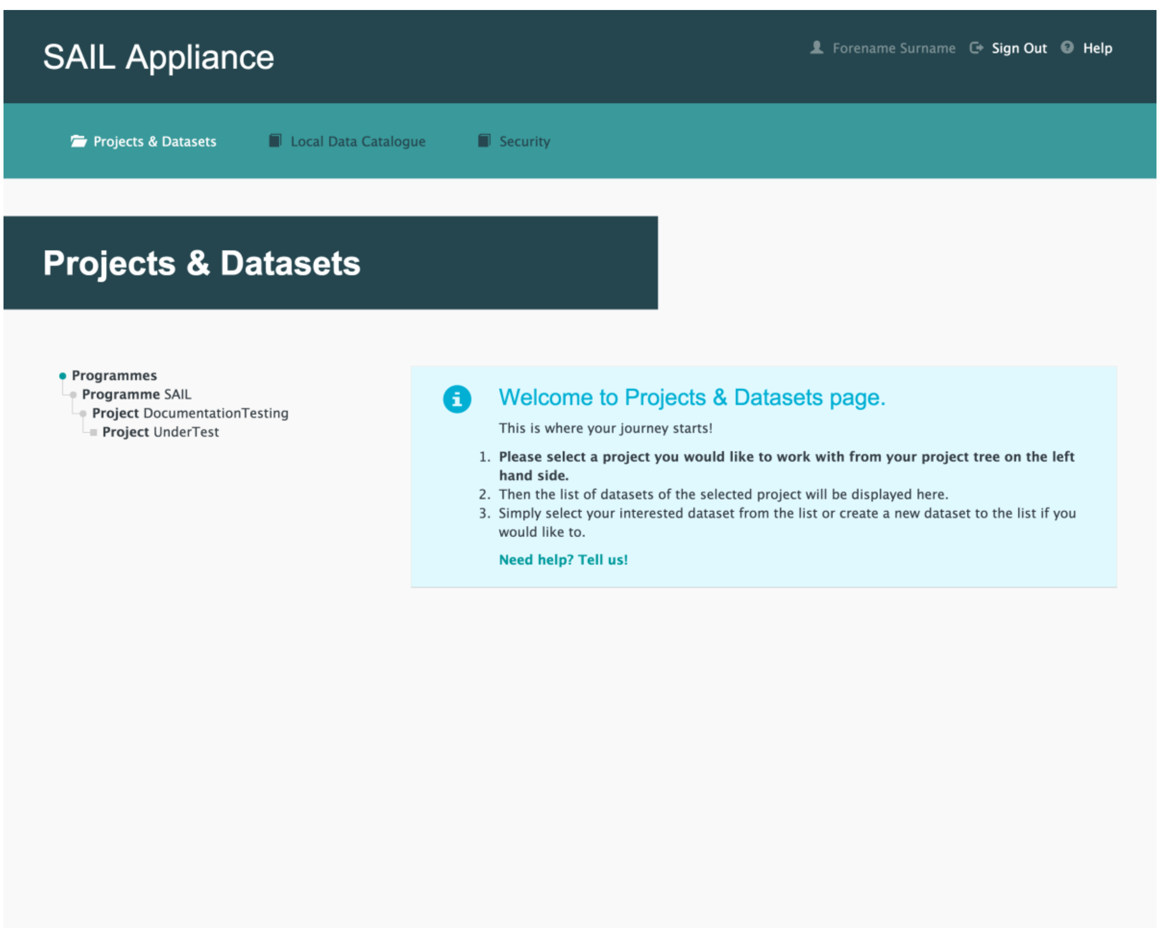
Once the Pre-Publish process is complete, the Dataset can be viewed in the Local Data Catalogue.

Local Data Catalogue

This section of the user interface allows users to view Datasets that have been published via the Projects & Datasets page.

To view this page

1. Log in to the RDA



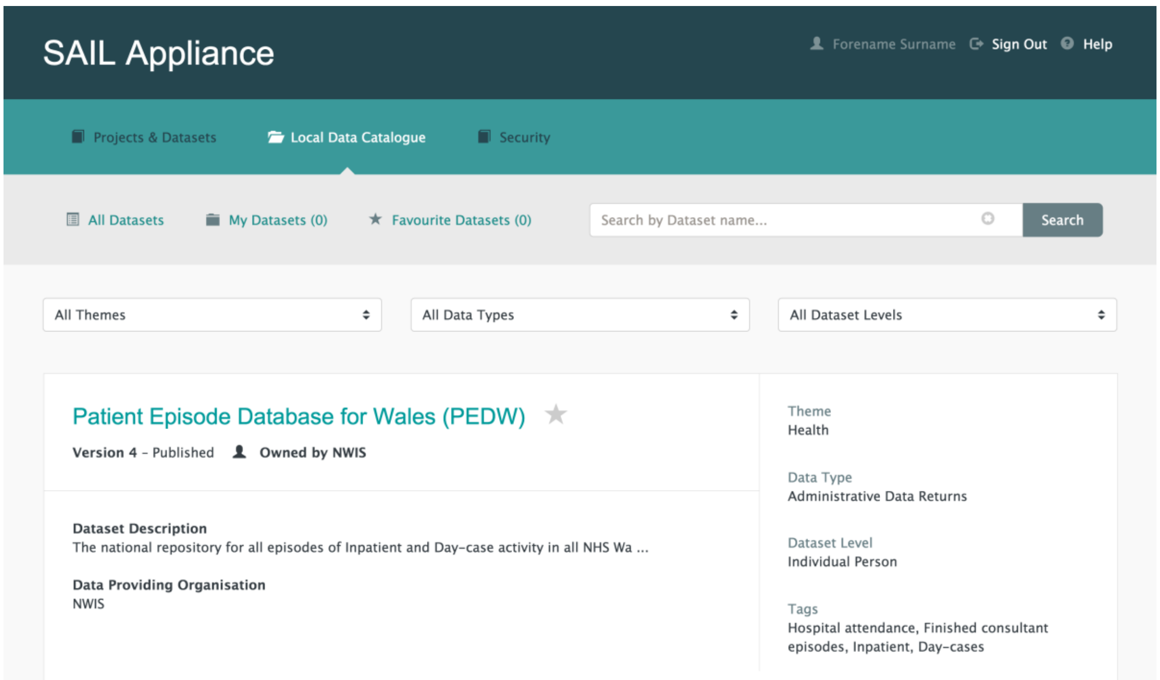
Default view of RDA user interface

2. Click Local Data Catalogue

Local Data Catalogue menu item

Introduction

The page view can be filtered based on the types of Dataset.



Local Data Catalogue page

Definitions

All Datasets

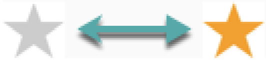
Display all Datasets that the user has permission to view

My Datasets

Display only the user's own Datasets

Favourite Datasets

Display only the Datasets that the user has previously marked as favourites. The star symbol to the right of each entry in the Local Data Catalogue is used to mark that entry as a favourite:



All Themes

Filter by the theme of the Dataset, e.g. Housing

All Data Types

Filter by the type of Dataset, e.g. Administrative Data Returns

All Dataset Levels

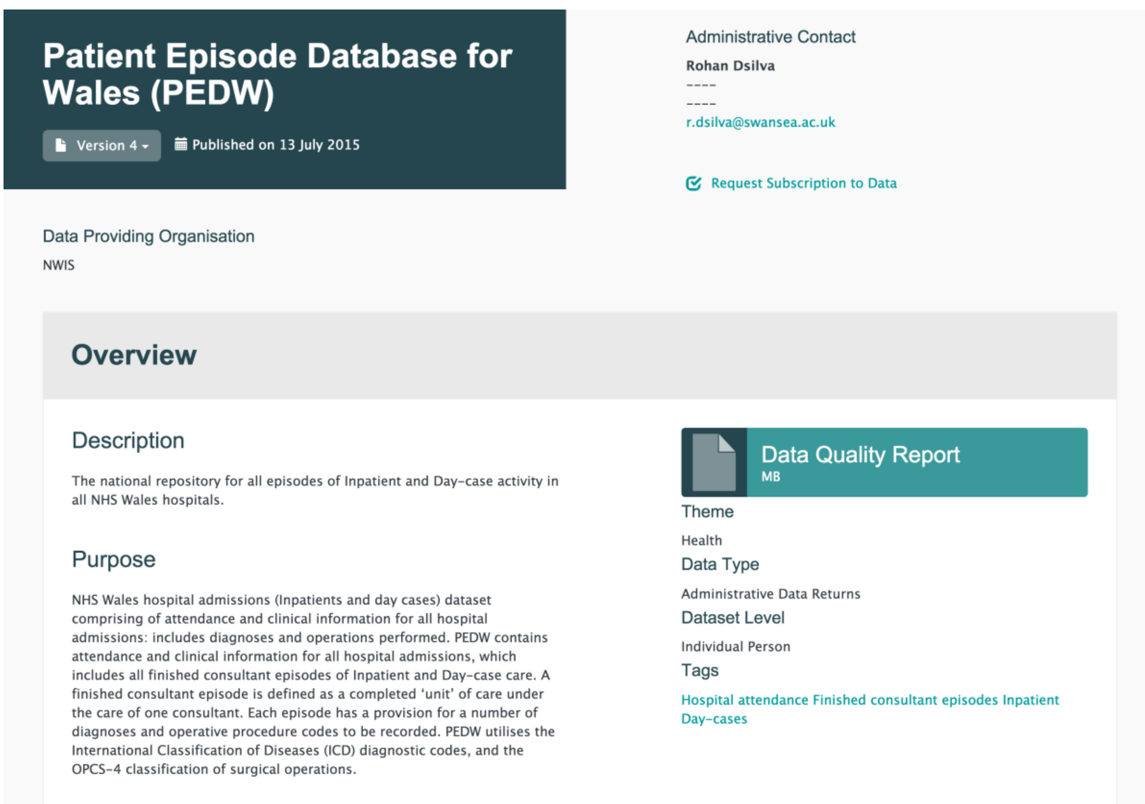
Filter by the level of the Dataset, e.g. Individual Person

Click the title of any entry to view more information about it. An example entry is shown below.

Overview

This section contains text to describe the purpose of the Dataset. It also contains a button to download the Data Quality Report.

This section also confirms the Theme, Data Type, Dataset Level, and Tags for the Dataset.



Local Data Catalogue page with Dataset selected – Overview section

Definitions

Entry Title

The title of the current Dataset

Version number

The version of the current Dataset

Publication date

The date on which the current version of the Dataset was published

Administrative contact

Contact details of the responsible party

Request Subscription to Data

This link allows the user to subscribe and be notified about updates to the data in the selected Dataset

Data Providing Organisation

The organisation that owns the data in the Dataset

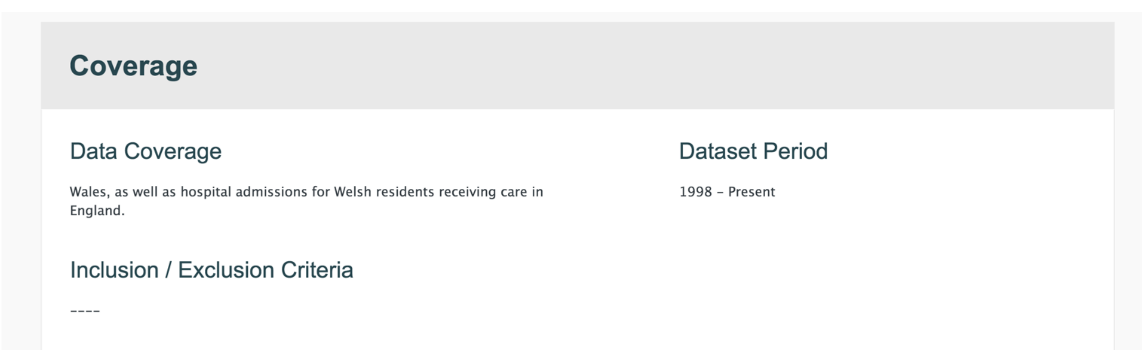
Data Quality Report

Download a PDF of the information associated with the selected Dataset. For more information, see Data Quality Report

Coverage

This section contains the following data:

- **Data Coverage** – the scope of the data
- **Dataset Period** – the start and end dates relevant to the Dataset
- **Inclusion / Exclusion Criteria** – the factors that determine whether data are included or excluded from the Dataset



Local Data Catalogue page with Dataset selected – Coverage section

Collection

This section contains the following data:

- **Data Collection Method** – a description of how the data was collected

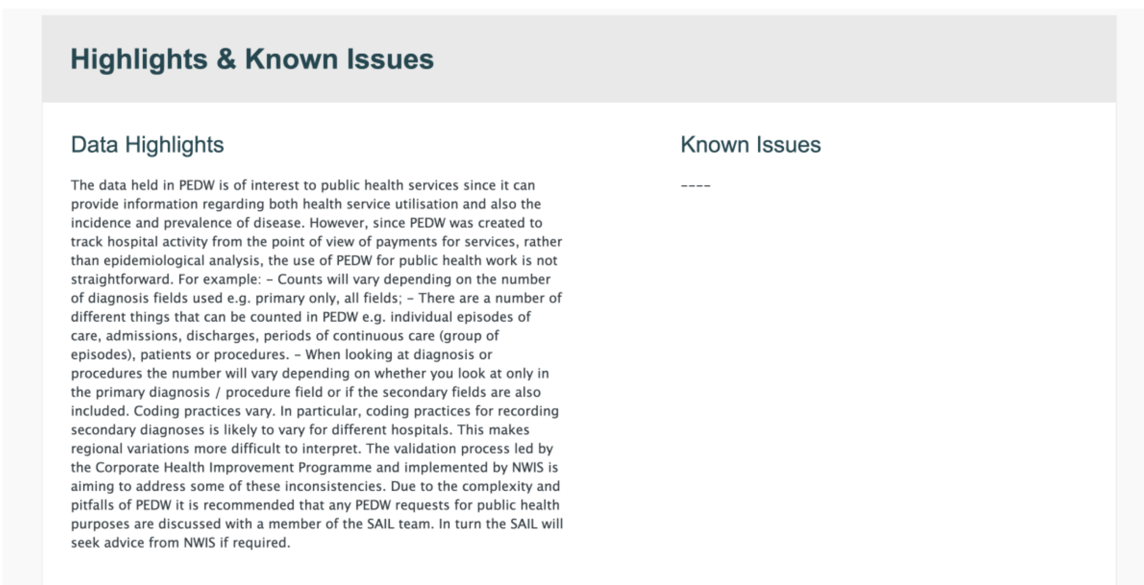
- **Refresh Frequency** – the time period in which the data is refreshed (weekly, monthly, etc.)

Local Data Catalogue page with Dataset selected – Collection section

Highlights & Known Issues

This section contains the following data:

- **Data Highlights** – a summary description of the data, including notes on usefulness of the data and guidance on how access to the data should be requested
- **Known Issues** – a summary of any problems associated with the data



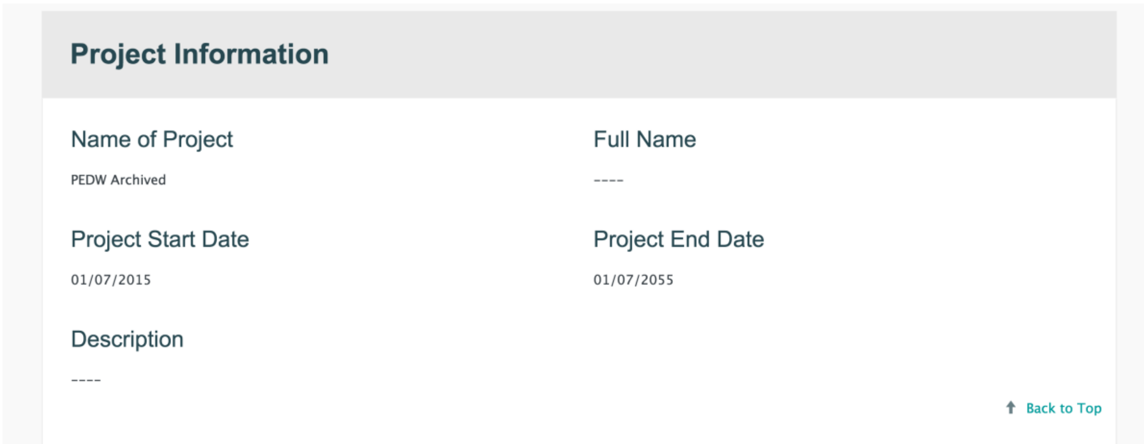
Local Data Catalogue page with Dataset selected – Highlights & Known Issues section

Project Information

This section contains the following data:

- **Name of Project** – the title of the Project
- **Project Start Date** – the date the Project started

- **Description** – a summary description of the Project
- **Full Name** – the full name of the Project
- **Project End Date** – the date the Project ended

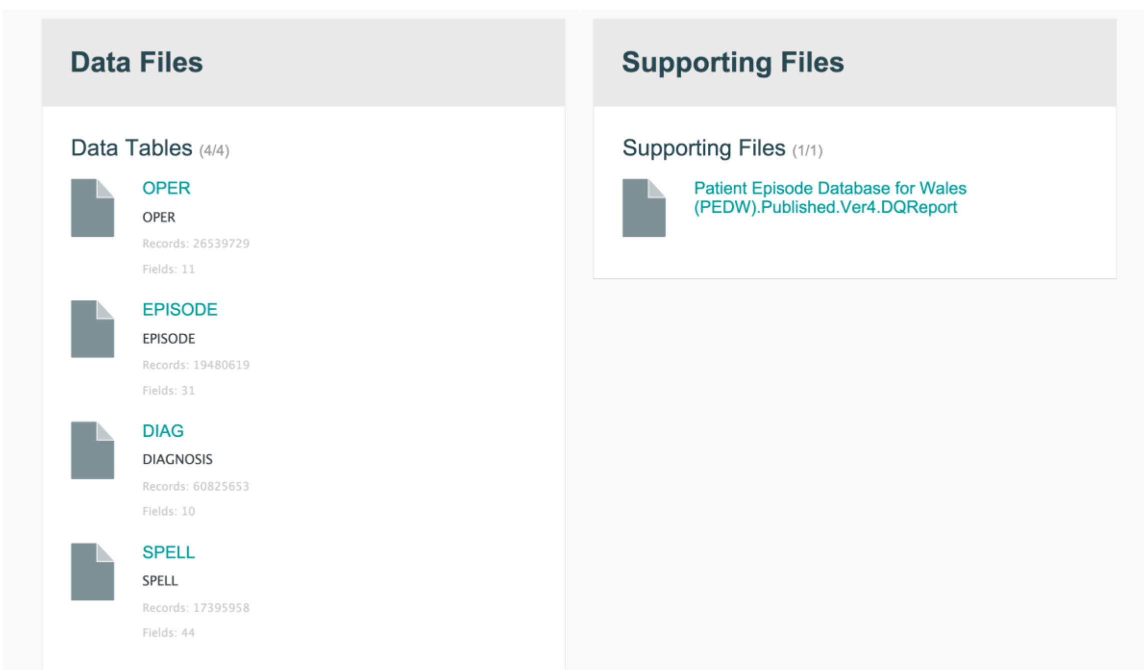


Local Data Catalogue page with Dataset selected – Project Information section

Data Files and Supporting Files

This section contains the following data:

- **Data Tables** – the tables of data that are part of the Dataset
- **Supporting Files** – the files uploaded via the [Supporting Files] page



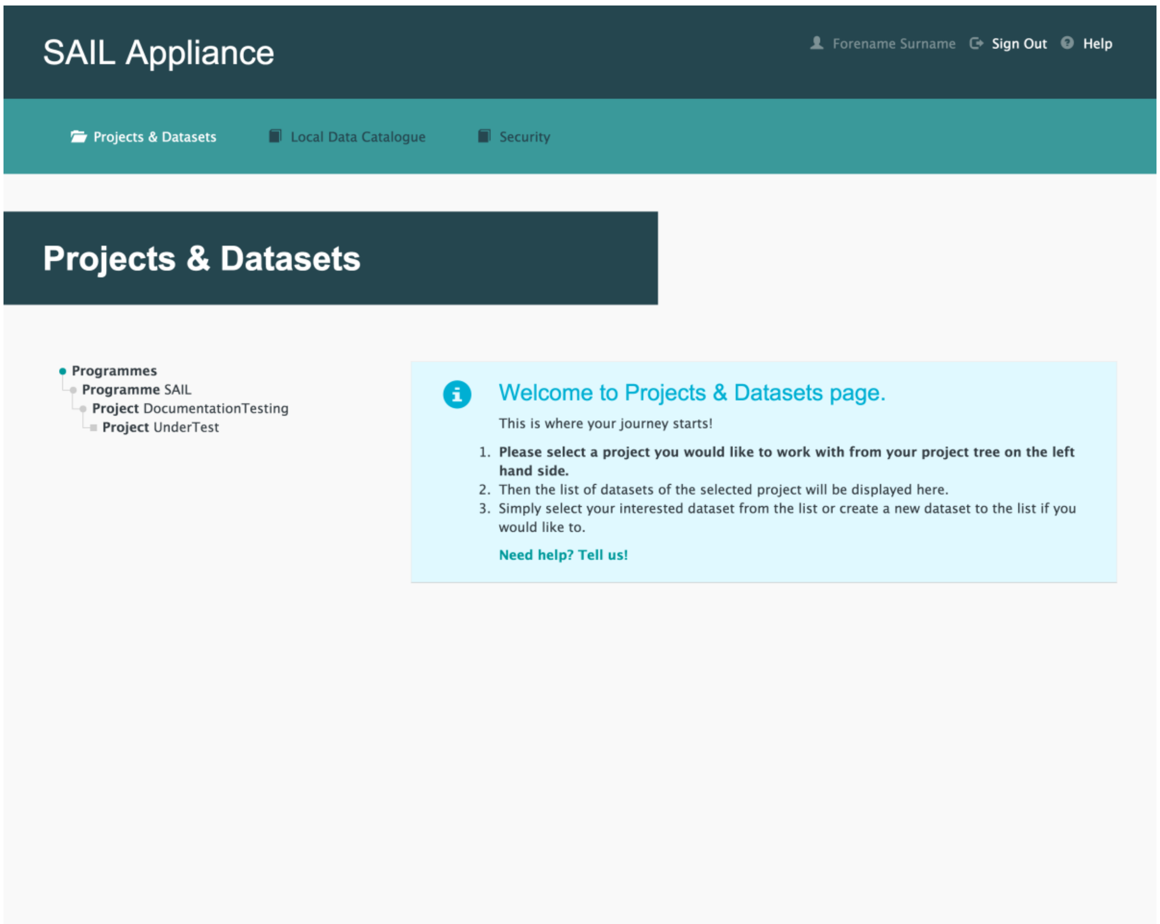
Local Data Catalogue page with Dataset selected – Data Files and Supporting Files section

Security

This section of the user interface allows administrators (Project Leads) and standard users (Analysts) to create sub Projects within their Programme. Users can also create user accounts based on the organisation's Active Directory.

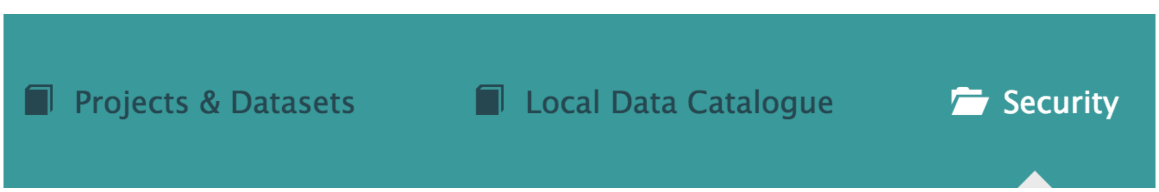
To view this page

1. Log in to the RDA



Default view of RDA user interface

2. Click Security



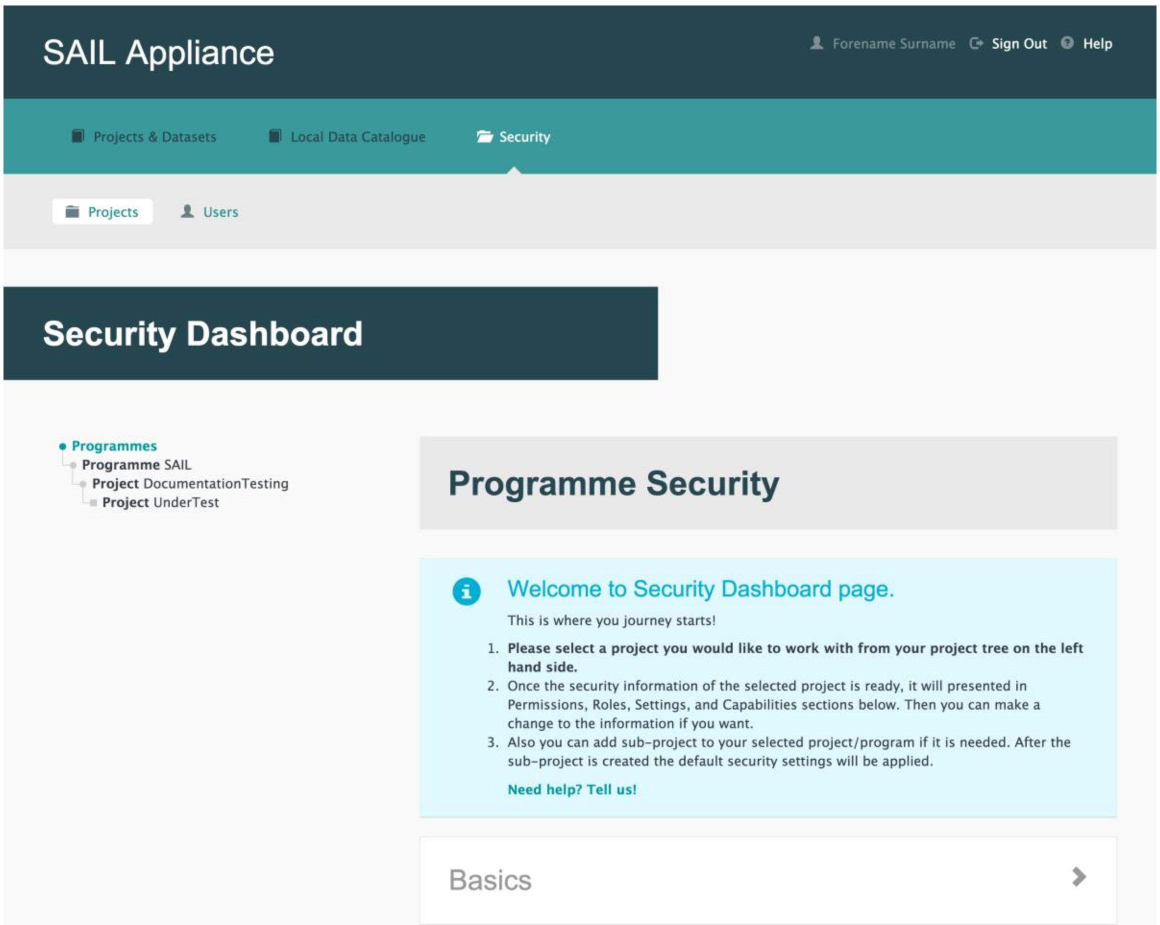
Security menu item

Introduction

This page is split up into the following parts:

- [Projects]
- [Users]

The default view of the Security page (Projects) is shown below:



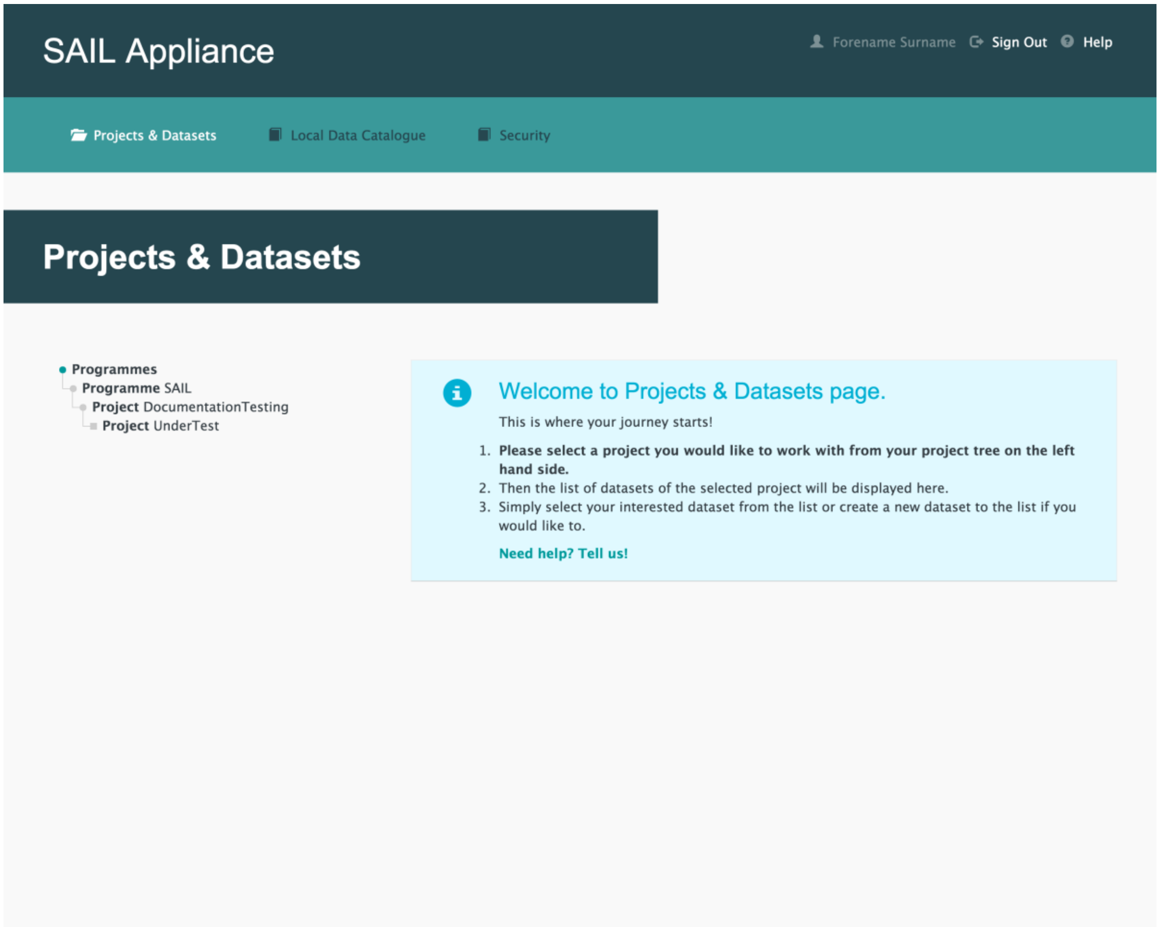
Default view of Security page – the Projects tab

Projects

The Projects page is used to define and update security settings for each Project.

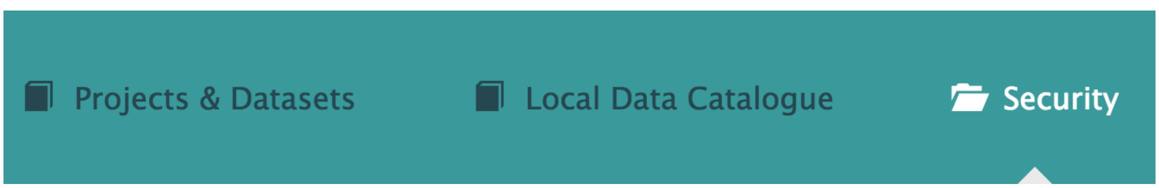
To view this page

1. Log in to the RDA



Default view of RDA user interface

2. Click Security

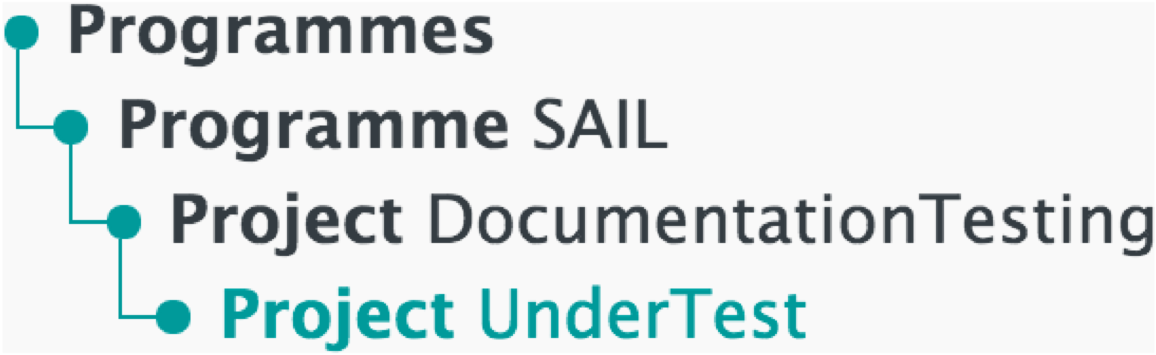


Security menu item

3. Click Projects

Projects menu item

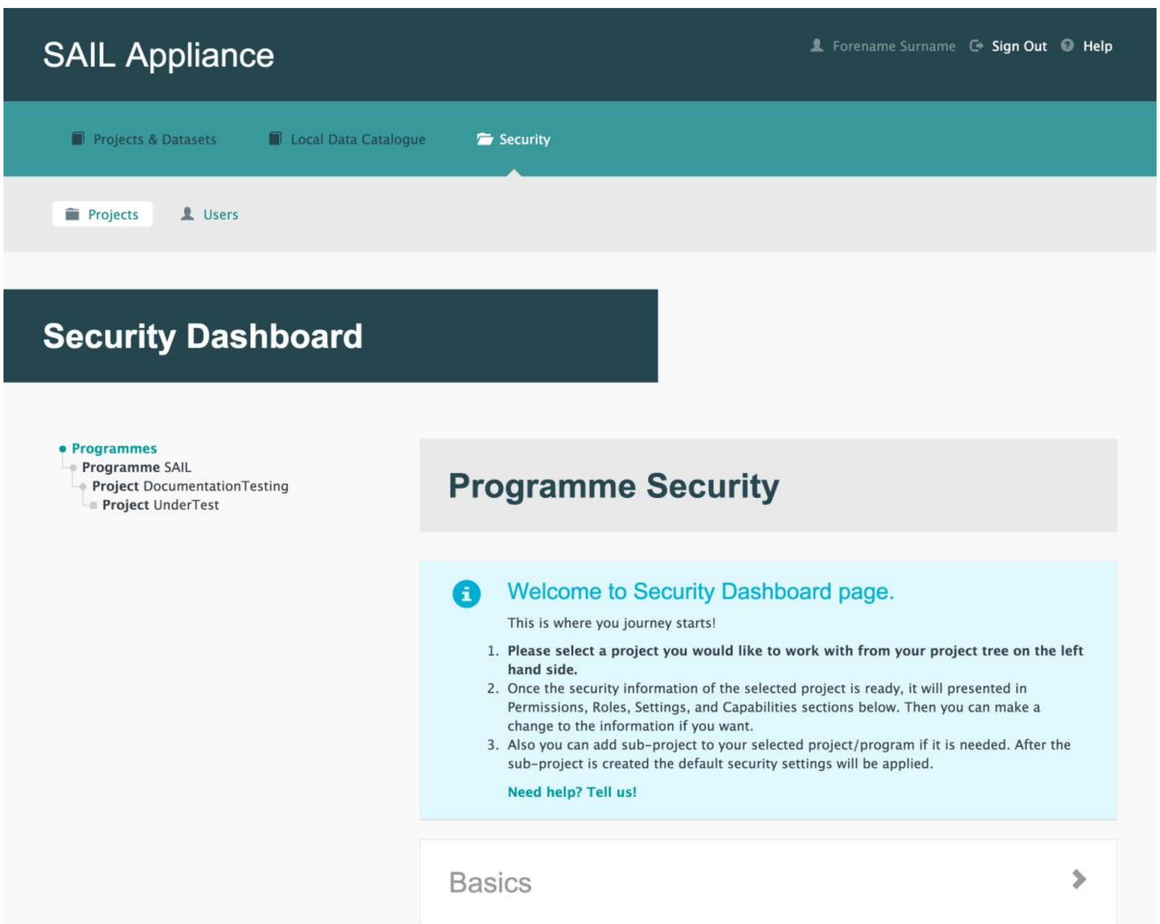
4. Select a Project from the left-hand navigation menu



Left-hand navigation menu showing available Projects

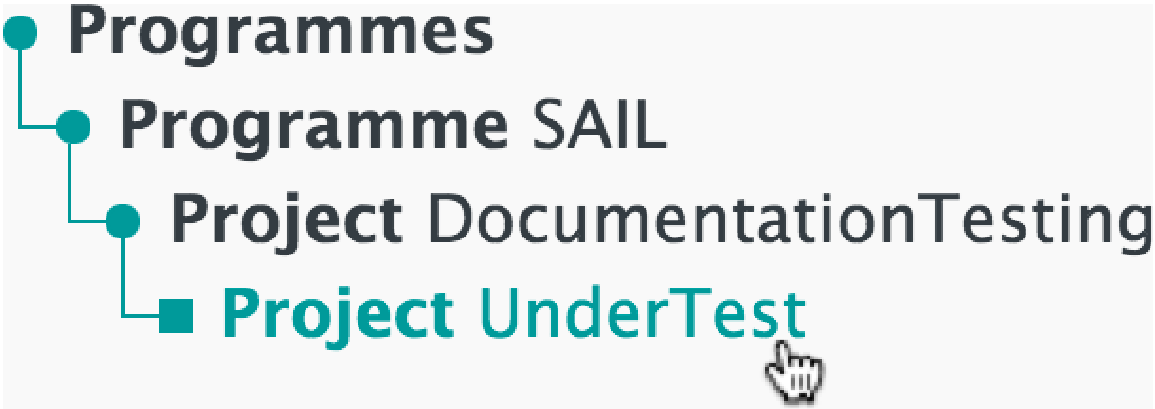
To define and update security settings for a Project:

1. Click a Project name from the left-hand navigation list



Security page | Projects

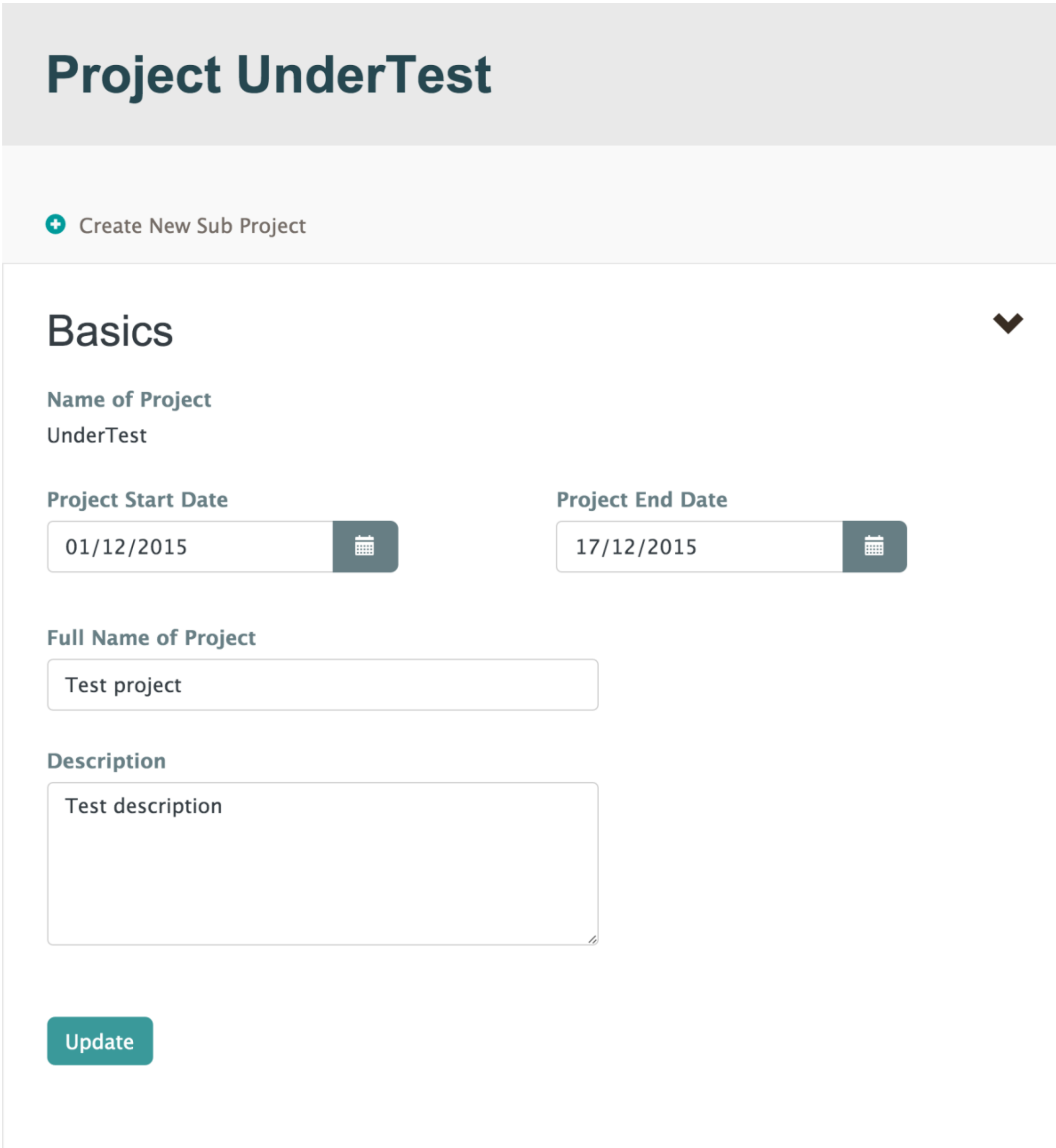
An example of the navigation menu to the left of the page is shown below:



Left-hand navigation menu - select a Project

2. Click into the section titles in the main part of the page to view and edit the relevant settings

Basics



Security page | Basics section

Definitions

Create New Sub Project

Create a new Sub Project within the current Project

Name of Project

The name of the current Project

Project Start Date

The start date of the Project. Click to reveal a calendar panel to choose the date

Project End Date

The end date of the Project. Click to reveal a calendar panel to choose the date

Full Name of Project

The long name of the Project

Description

A meaningful description of the Project

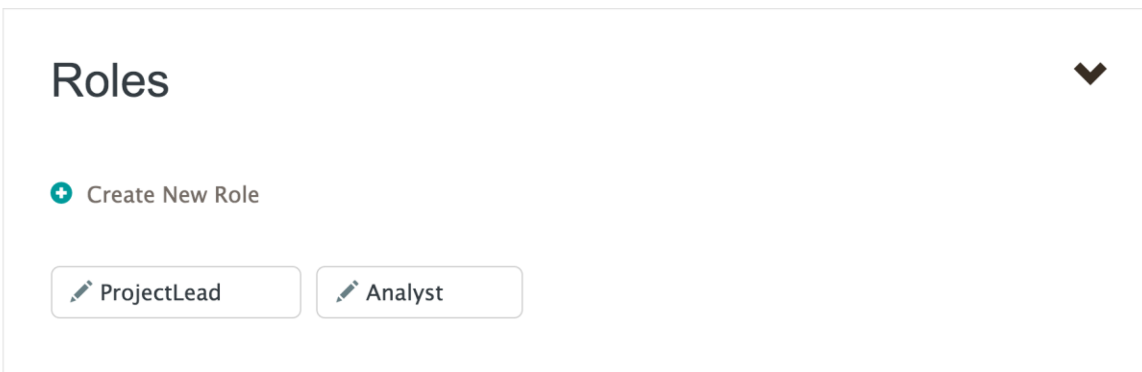
Update

Confirm any changes to the settings in this panel

Roles

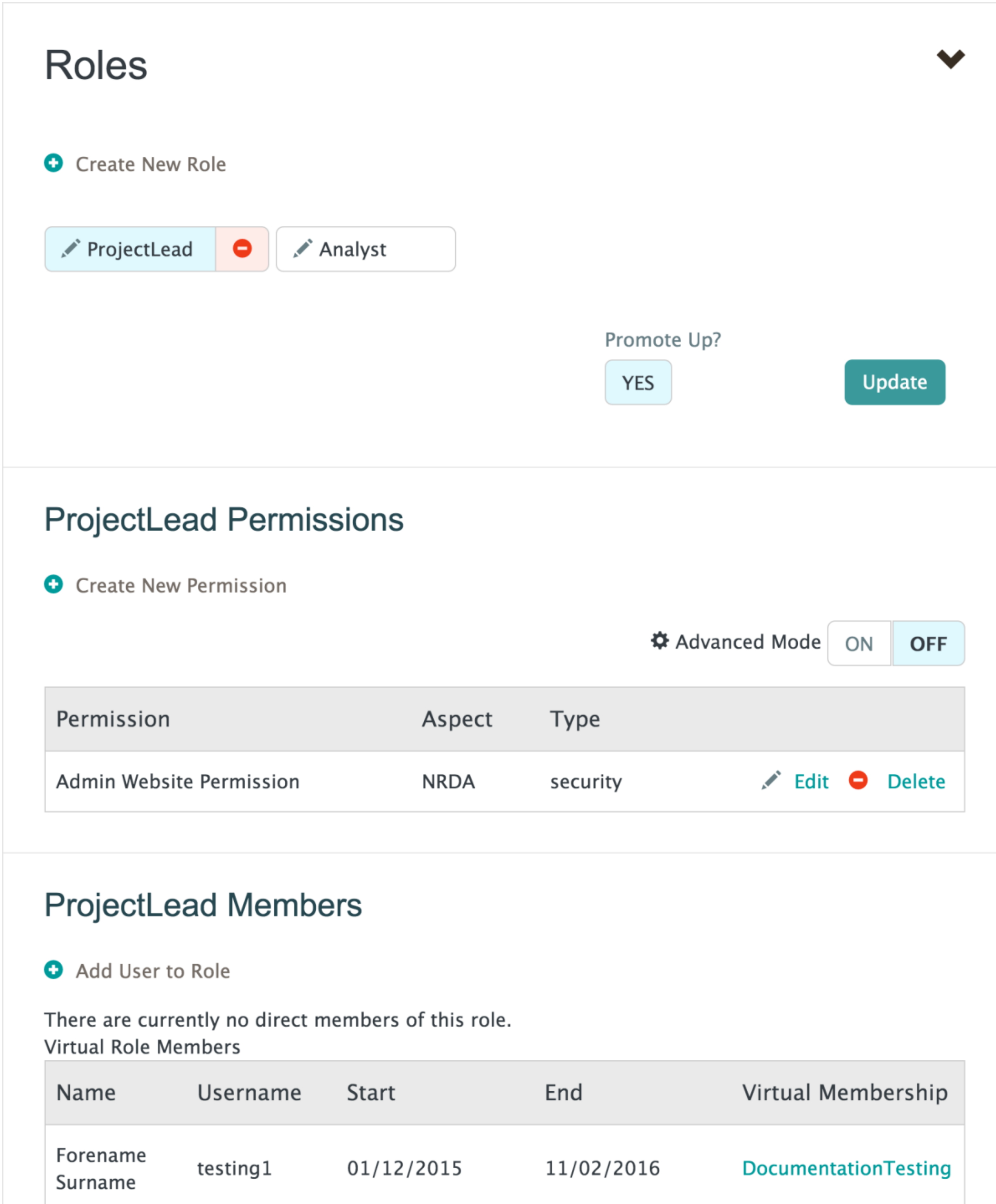
This section defines the types of user that have access to the user interface. For the purposes of this user guide, the available Roles are:

- **ProjectLead** – for administrators
- **Analyst** – for standard users



Default view of Roles section

Click a Role type to see an expanded view of the Roles section, as shown below:



Expanded view of Roles section with ProjectLead details

All users in the selected Role are shown in the Members section at the bottom of this panel.

Definitions

Create New Role

Create a new Role within the current Project

Promote Up?

Any Role for a Project that appears higher up in the tree and has the same name will also have the permissions of the Role promoting up. This setting is always enabled and cannot be changed by users

Update

Confirm any changes to the settings in this panel

Create New Permission

Add a new permission

Advanced Mode

On/off toggle to switch between a standard and advanced view of the panel

Add User to Role

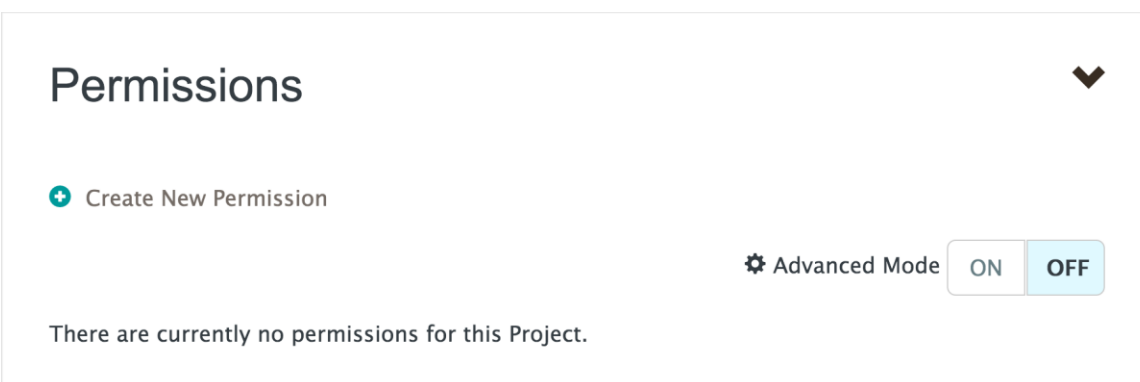
Add a user to the selected Role

Permissions

This section defines permissions for the current Project. Permissions are used to define which users have access to the Project areas on the servers (DB2, SQL server, etc.).

Permissions in the RDA are similar to file permissions in computing: files can be read-only (r), read and write (rw), and execute (x). These permissions are attributed to a Project and are inherited by all Sub Projects.

> Permissions created in this section are visible in the [Effective Permissions](#) section of the [Users](#) page.
>
> Standard users do not have access to the Permissions panel.



Default view of the Permissions section

Create New Permission

Create a new permission item within the current Project

Advanced Mode

On/off toggle to switch between a standard and advanced view of the panel
Capabilities

This section lists the resources available for the RDA to use. Some Capabilities define whether users can create permissions for a server. Capabilities also define the type of server into which data is loaded. Other Capabilities include database loading, Dataset sharing, and destination sharing.

Users are not able to create Capabilities. Users can turn off Capabilities if they wish to restrict the ability to set permissions in Sub Projects

For a Dataset to be a shared with an external organisation, the following Capabilities must be enabled for the Project:

- **Clinical Share Destination**
- **Demographics Share Destination**

Capabilities

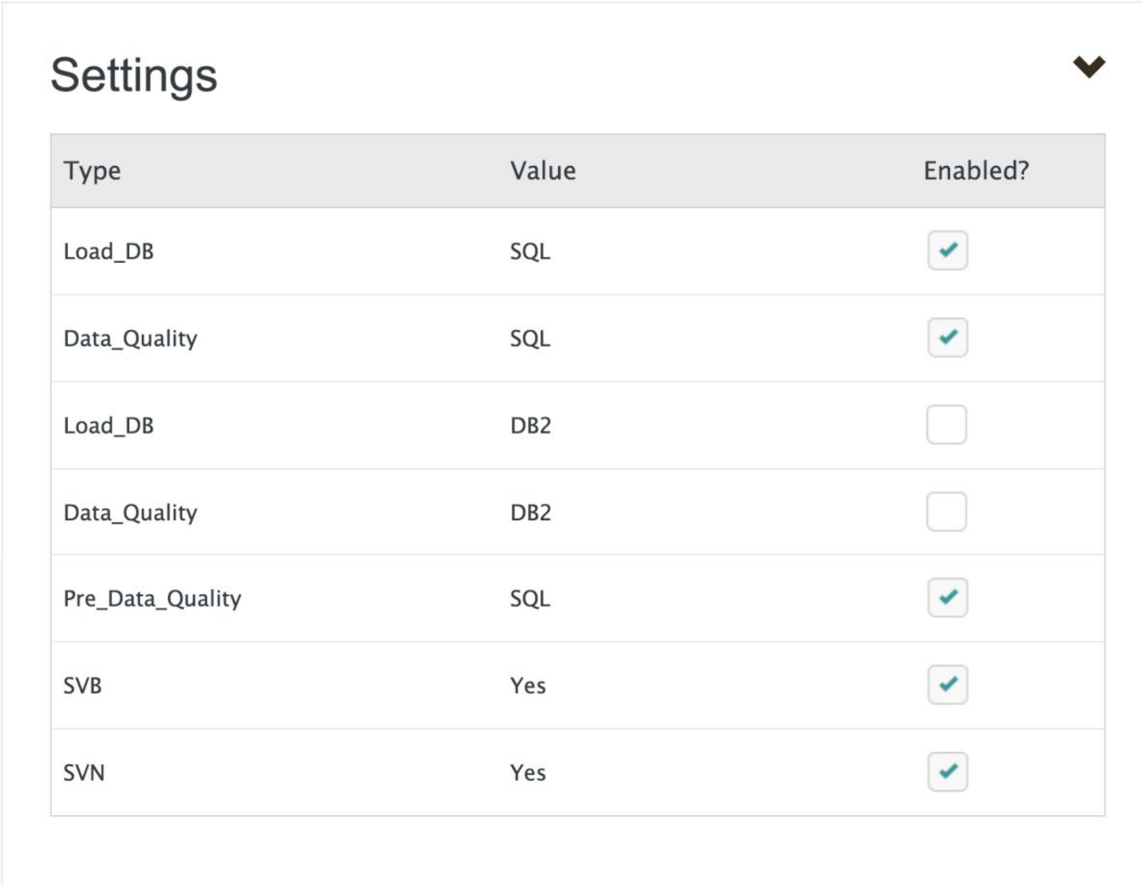
There are currently no capabilities for this Project.
Inherited Capabilities

Type	Value
Load_DB	SQL
Data_Quality	SQL
Load_DB	DB2
Data_Quality	DB2
Pre_Data_Quality	SQL
SVB	Yes
SVN	Yes

Security page | Capabilities section section

Settings

This section lists the Capabilities that are enabled in the current Project.



Settings

Type	Value	Enabled?
Load_DB	SQL	✔
Data_Quality	SQL	✔
Load_DB	DB2	
Data_Quality	DB2	
Pre_Data_Quality	SQL	✔
SVB	Yes	✔
SVN	Yes	✔

Security page | Settings section

Enabled?

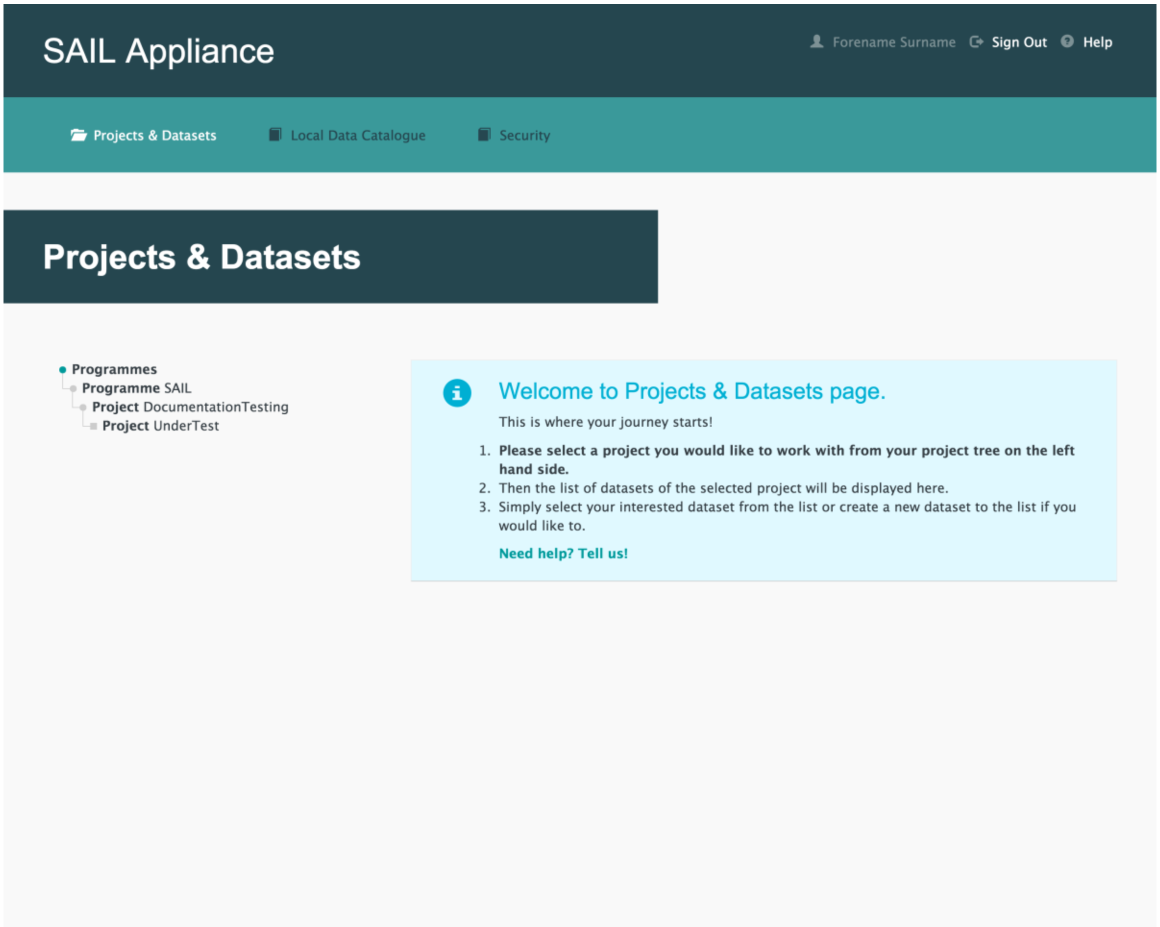
Confirms whether a setting is on or off in the current Project

Users

The Users page displays a list of all users in the system.

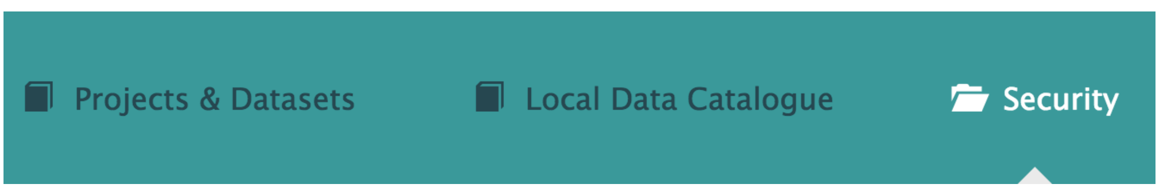
To view this page

1. Log in to the RDA



Default view of RDA user interface

2. Click Security



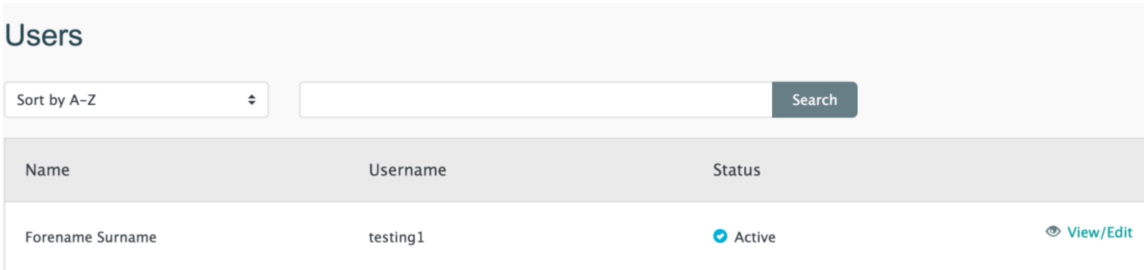
Security menu item

3. Click Users

Users menu item

Introduction

The default view of the Users page is shown below:



Default view of Users page

Definitions

Sort by A-Z

Adjust sorting of the list of accounts

Search

Filter results by the search criteria

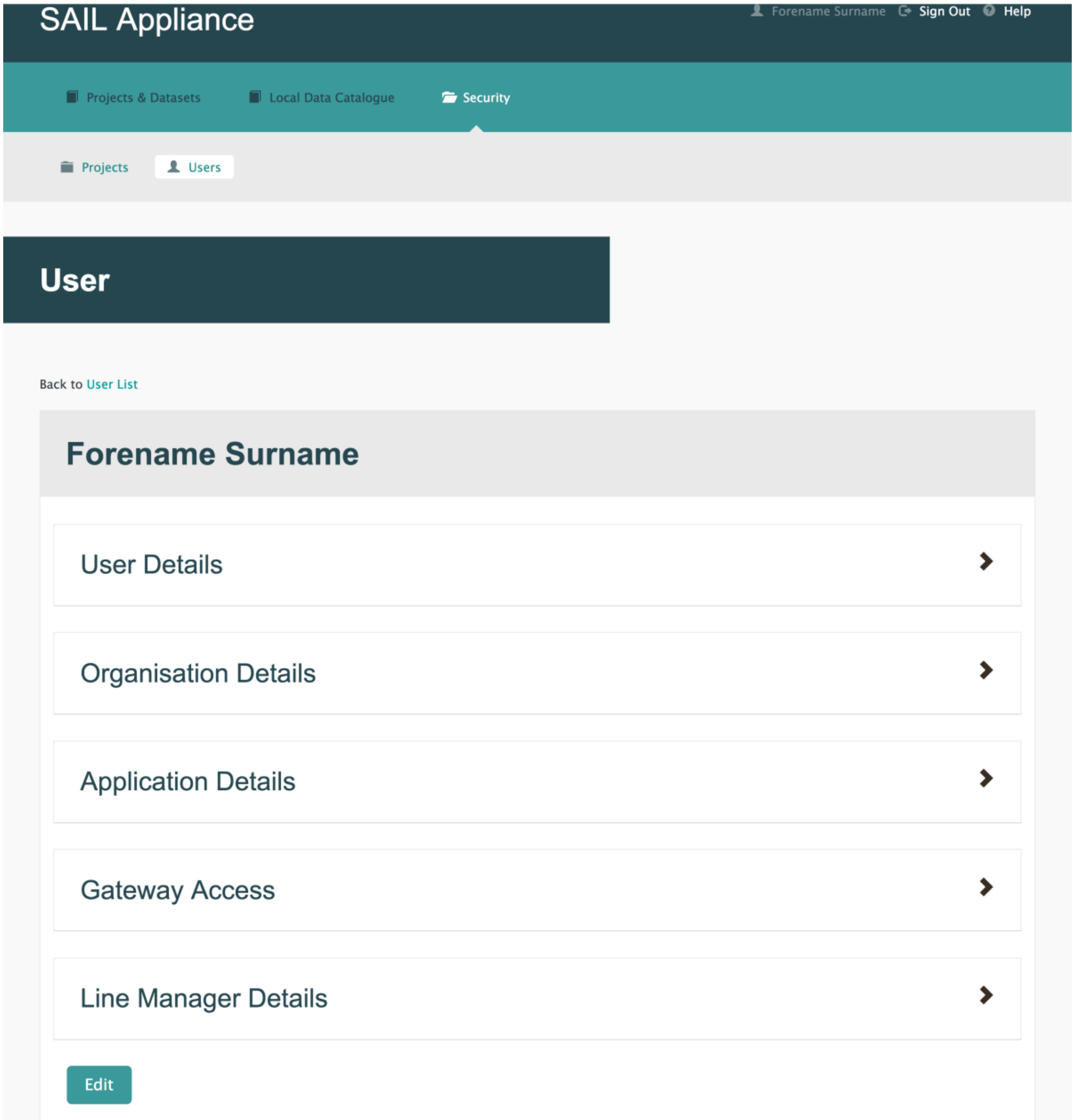
View/Edit

View and edit details of the selected account

The details of the selected user account are shown in the following sections:

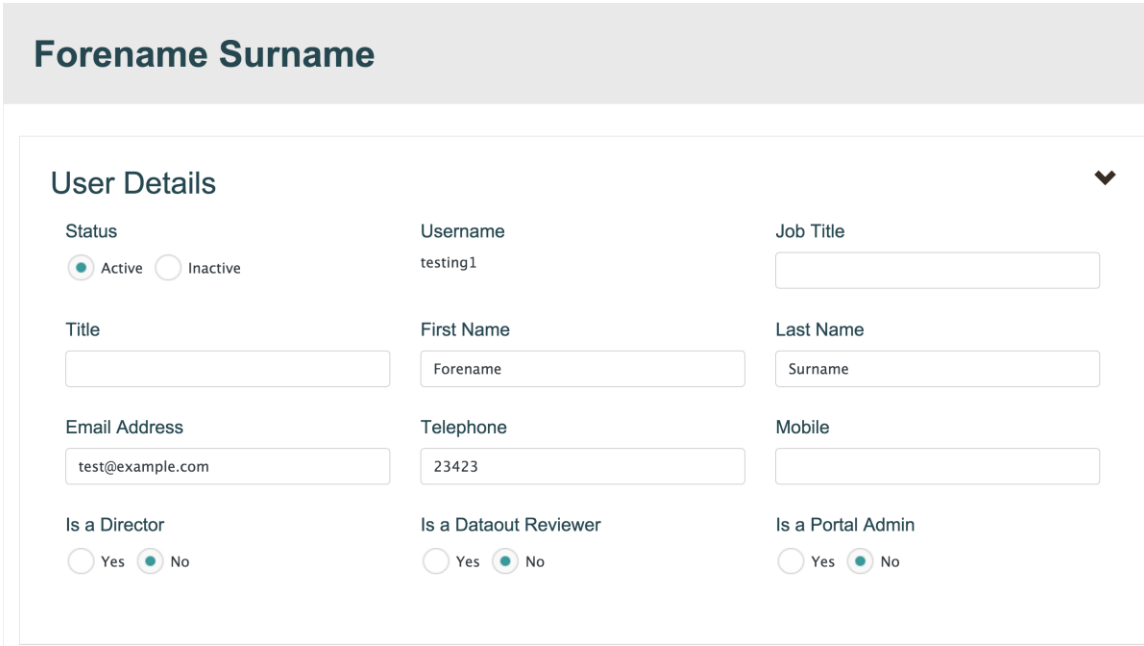
- User Details
- Organisation Details
- Application Details
- Gateway Access
- Line Manager Details
- Effective Permissions

To edit any of these sections, click Edit and then click the relevant section to expand it.



User account in view mode

User Details



User Details section

Status

The status of the account. Only Active users can log in to the system

Username

The username of the account

Job Title

The user's job title

Title

The user's common title (Mr, Mrs, etc.)

First Name

The user's forename

Last Name

The user's surname

Email Address

The user's email address

Telephone

The user's landline telephone number

Mobile

The user's mobile telephone number

Is a Director

Indicates whether the user is a Director of the portal

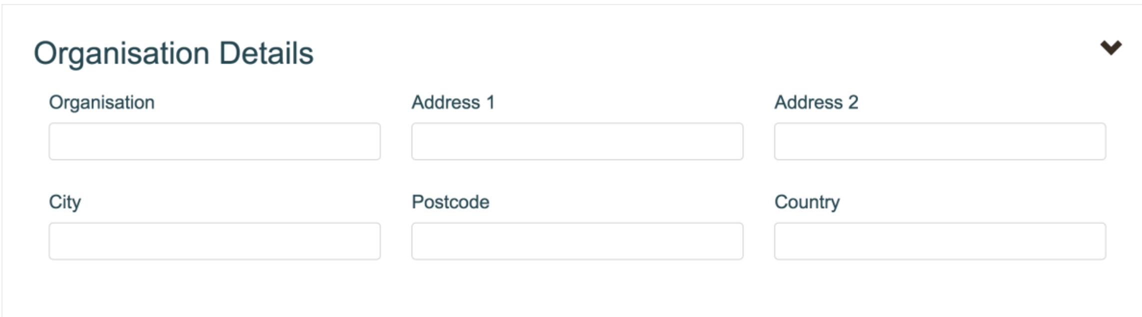
Is a Dataout Reviewer

Indicates whether the user can review research output for extraction from the secure environment

Is a Portal Admin

Indicates whether the user is an administrator of the portal

Organisation Details



Organisation Details section

Organisation

The organisation the user represents

Address 1

The first line of the postal contact address

Address 2

The second line of the postal contact address

City

The city of the postal contact address

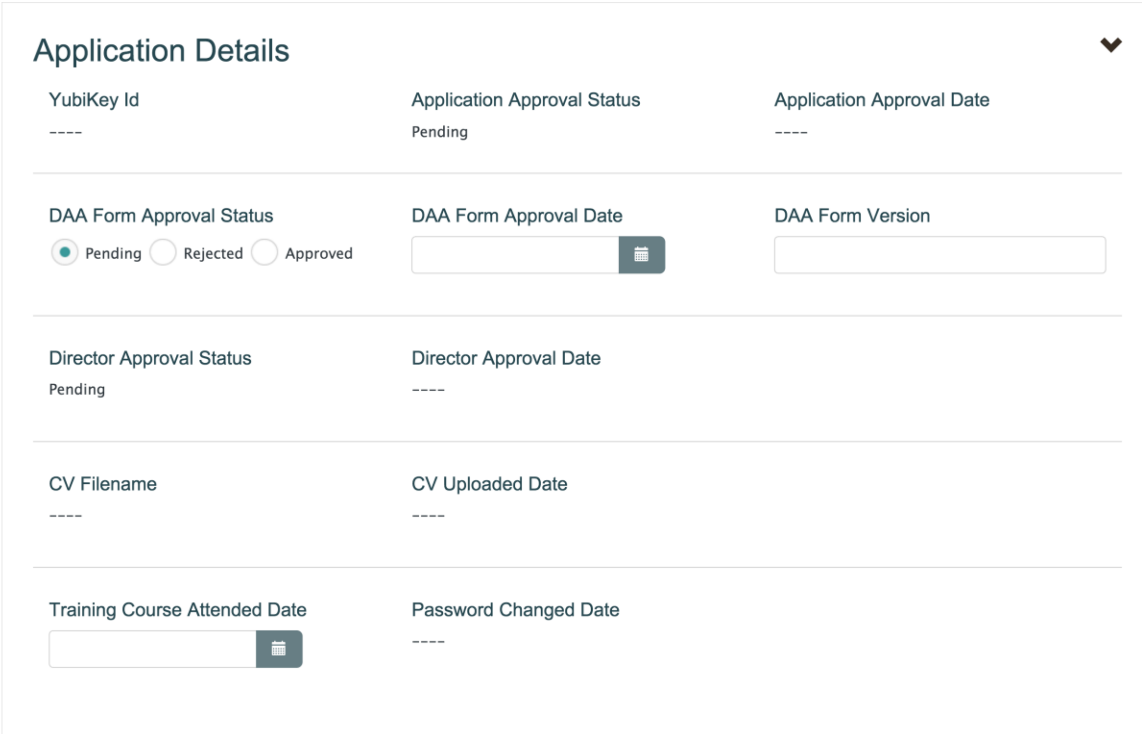
Postcode

The postcode of the postal contact address

Country

The country of the postal contact address

Application Details



Application Details section

YubiKey Id

Encrypted security key that enables two-factor identification

Application Approval Status

Refers to the Information Governance Review Panel application. Projects submit this application that summarises the Project they want to undertake on SAIL to the IGRP. The application has to be approved before the Project can go ahead

Application Approval Date

The date the Project application was approved

DAA Form Approval Status

DAA is the Data Access Agreement that users have to signed to become approved users. Only approved users can undertake a Project using SAIL

DAA Form Approval Date

Description

DAA Form Version

Description

Director Approval Status

The Director reviews and approves the DAA, Gateway account form and the CV of the user

Director Approval Date

The date on which the Director approved the DAA

CV Filename

Description

CV Uploaded Date

Description

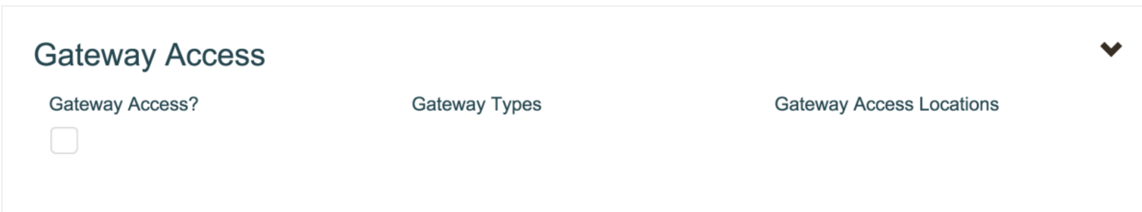
Training Course Attended Date

Date on which the user took an approved training course to become an approved SAIL user

Password Changed Date

The last date of an account password change

Gateway Access



Gateway Access section

Gateway Access?

Tick this box to grant the user access to the gateway

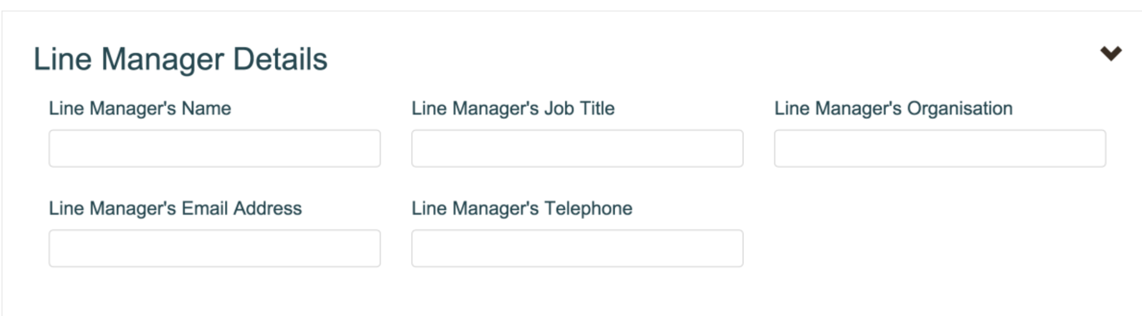
Gateway Types

A list of gateway types

Gateway Access Locations

A list of gateway access locations

Line Manager Details



Line Manager Details section

Line Manager's Name

The line manager's name

Line Manager's Job Title

The line manager's job title

Line Manager's Organisation

The line manager's organisation

Line Manager's Email Address

The line manager's email address

Line Manager's Telephone

The line manager's contact telephone number

Effective Permissions

The final section of the page displays the permissions and aspects associated with the selected user account. These settings are defined via the [Permissions](#) section of the [Projects](#) page.

Effective Permissions

Project / Role	Permission	Aspect	(Calc)Group
Project: DocumentationTesting Role: ProjectLead	security	NRDA	SAIL.DocumentationTesting.NRDA.security
Project: UnderTest Role: ProjectLead	security	NRDA	SAIL.UnderTest.NRDA.security
Project: NRDATest Role: ProjectLead	security	NRDA	SAIL.UnderTest_NRDATest.NRDA.security
Project: NRDATest123 Role: ProjectLead	security	NRDA	SAIL.UnderTest_NRDATest123.NRDA.security
Project: NRDATest456 Role: ProjectLead	security	NRDA	SAIL.UnderTest_NRDATest456.NRDA.security
Project: UnderTestSub Role: ProjectLead	security	NRDA	SAIL.UnderTestSub.NRDA.security

Effective Permissions section

Data Quality Report

When a Dataset is uploaded in Projects & Datasets, the system creates a Data Quality Report. This summary of the uploaded data is viewable in the [Local Data Catalogue](#).

To view this page

1. Log in to the RDA

2. Click Local Data Catalogue
3. Click a Project from the list
4. Click Data Quality Report

Introduction

The Data Quality Report is displayed as a PDF. Your browser should download the file automatically. You may need to install a PDF reader in order to view the Data Quality Report.

Tables analysed

The first section of the Data Quality Report shows a list of all tables analysed as part of the report, as shown below:

TABSCHEMA	TABNAME	# of Records	# of Fields
SAILPEDWV	DIAG	60,825,653	10
SAILPEDWV	EPISODE	19,480,619	31
SAILPEDWV	OPER	26,539,729	11
SAILPEDWV	SPELL	17,395,958	44

Summary of all tables analysed in the Data Quality Report

- **TABSCHEMA** – the schema controlling the table
- **TABNAME** – the table name
- **# of Records** – the number of records (rows) in the table
- **# of Fields** – the number of fields (columns) in the table

Results of analysis

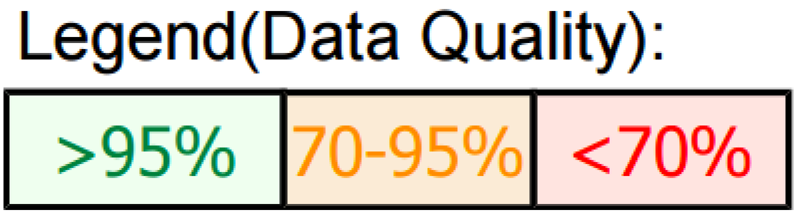
The results of the analysis of each table are displayed in accordance with the following keys:

Data Type key

Definitions

- **Numeric** – contains numeric data
- **Character** – contains text data
- **Date** – contains a date stamp
- **Datetime** – contains a date and time stamp

- **Time** – contains a time stamp



Data Quality key

Definitions

- **>95%** – data quality is good
- **70–95%** – data quality is moderate
- **<70%** – data quality is poor

Table sample

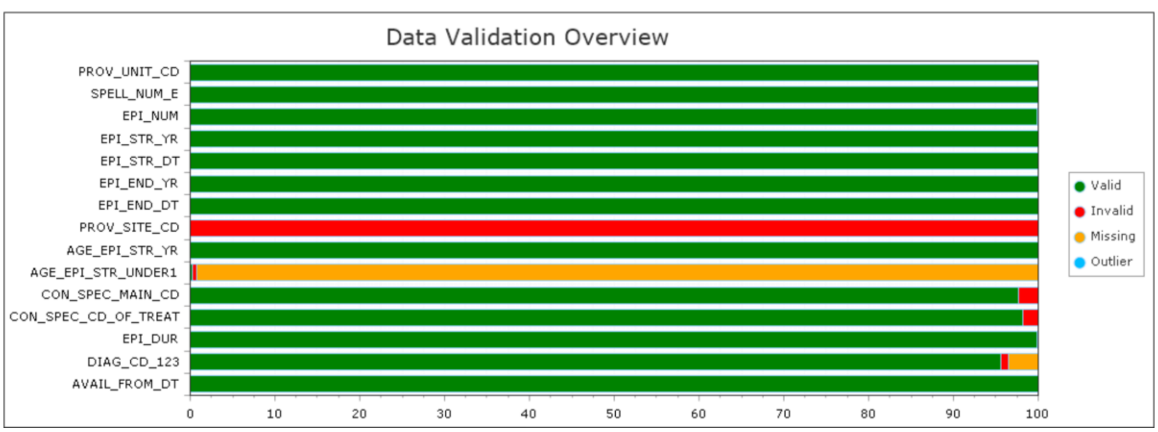
A sample table is shown below:

COLNAME	COLLABEL	VALID	INVALID	MISSING	OUTLIER	MIN	MAX	MEAN	MEDIAN	STD	COMMENT
SPELL_NUM_E	"A number (alphanumeric) to provide a unique identifier for each hospital provider spell for a health care provider. For more information see http://www.datadictionary.wales.nhs.uk/WordDocuments/hospitalproviderspellnumber1.htm"	100	0	0	0						
DIAG_NUM	"A number used to identify the position of diagnosis assigned to a patient. Value 1 relates to the primary ICD Diagnostic Code (for more details see http://www.datadictionary.wales.nhs.uk/WordDocuments/primaryicddiagnosticcode1.htm) Values > 1 relate to secondary ICD diagnositic codes (for more information see http://www.datadictionary.wales.nhs.uk/WordDocuments/secondaryicddiagnosticcode1.htm)"	100	0	0	0	1	14	3.27			

Sample table in the Data Quality Report

Data Validation Overview

This section of the Data Quality Report summarises the analysis of all tables, as shown below:



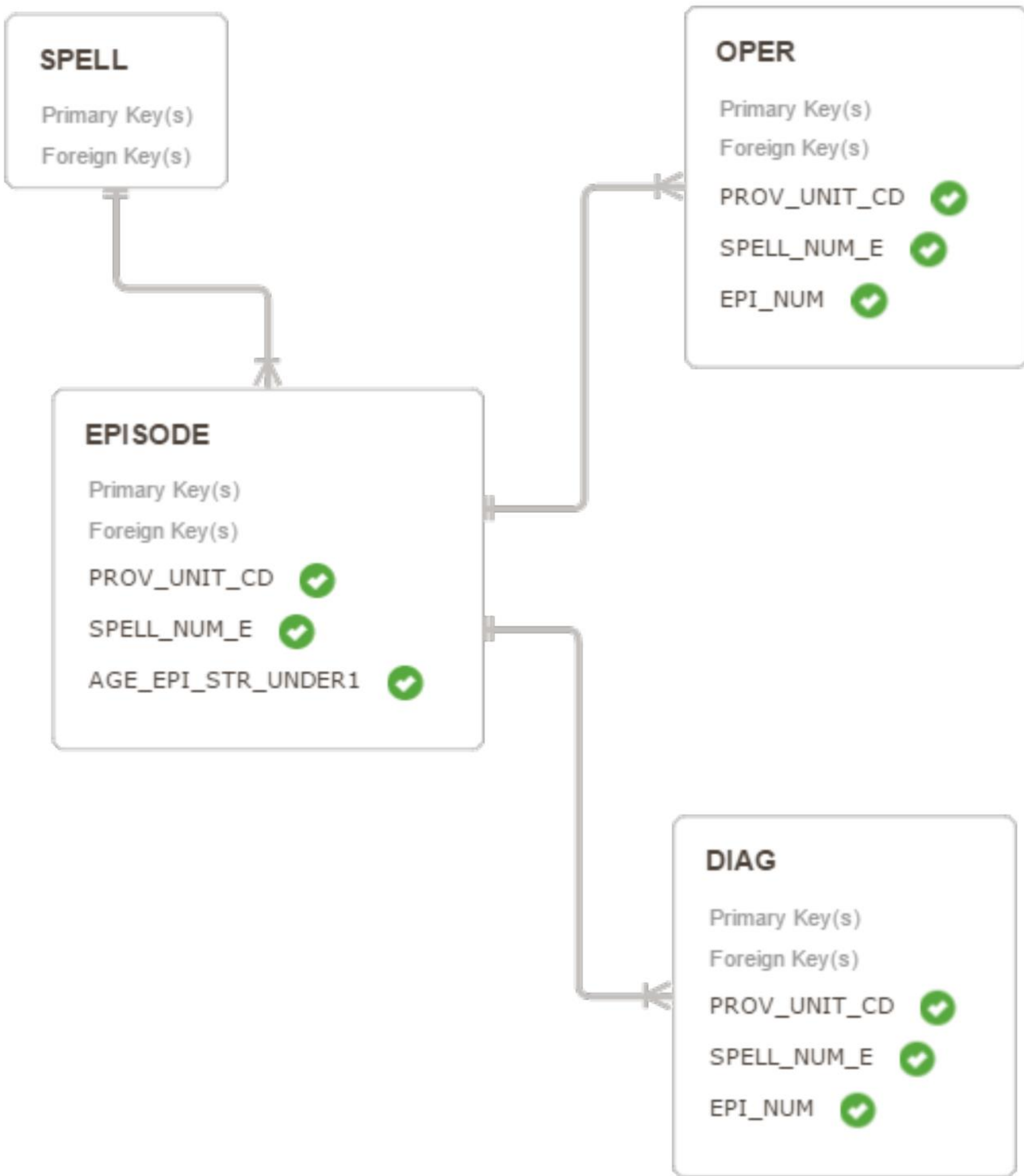
Summary analysis of all tables in the Data Quality Report

This key is used to categorise the data.

- **Valid** – data is present and valid
- **Invalid** – data is present but invalid
- **Missing** – data is missing
- **Outlier** – data is not within normal range of expected content

Entity Relationship Diagram

An example of the Entity Relationship Diagram included at the end of the Data Quality Report is shown below:



Sample Entity Relationship Diagram

For more information, see **Entity Relationship Diagram**.