

# DRCOG Data Portal User Guide



DATA PORTAL

Datasets

Organizations

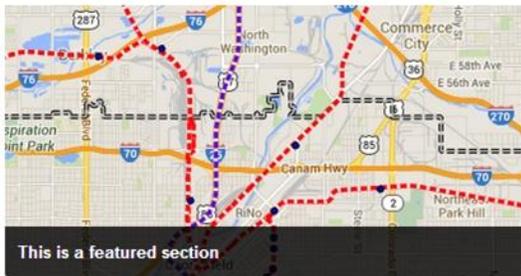
Map

About

Search



The Data Portal is an online application for data exchange between DRCOG and its members that promotes the creation of regional datasets for the purposes of planning, spatial analysis, and forecasting.



Search Your Data

eg. Census Data



Popular Tags

opencolorado

colorado

gis

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## Introduction

CKAN is an open source data management system for publishing, sharing, and finding data. DRCOG has leveraged the power of CKAN's web interface and API to create a data sharing tool between DRCOG and its member governments. The Data Portal allows invited users to login and upload and download data. The Data Portal promotes more transparent communication between us about our data. It gives DRCOG the opportunity to easily distribute datasets and better serve our members. This user guide is adapted specifically to the Data Portal, but also uses CKAN documentation for core concepts found here:

<http://ckan.readthedocs.org/en/latest/user-guide.html>

## Datasets and Resources

Data is published in units called “datasets”. When users search for data, search results return individual datasets. A dataset contains the following:

- Information about the data. For example, the title and publisher, date, format, etc.
- A number of “resources”, which hold the data itself. Different resources might contain the data for different years, or they might contain the same data in different formats. Spatial data, such as shapefile or geodatabase, must be in a zipped format in order to upload to the Data Portal.

## Organizations and Users

The Data Portal is a private site between DRCOG and its member governments. There is one organization for each member government as well as an organization for DRCOG. If DRCOG wants to share data with members for which a license agreement is required, this dataset will have its own organization. Each organization will have at least one administrator. This administrator is that organization's contact for questions as well as managing users. In order to obtain an account, you must be invited to join an organization from that organization's administrator. The following table shows the high-level actions for each role. For a more detailed matrix, refer to the [FAQs](#) document.

Roles	Actions						
	View datasets (including private from organization)	Download datasets	Edit organization's datasets	Create new datasets from organization	Delete organization datasets	Invite users	Manage user roles
Member							
Editor							
Admin							

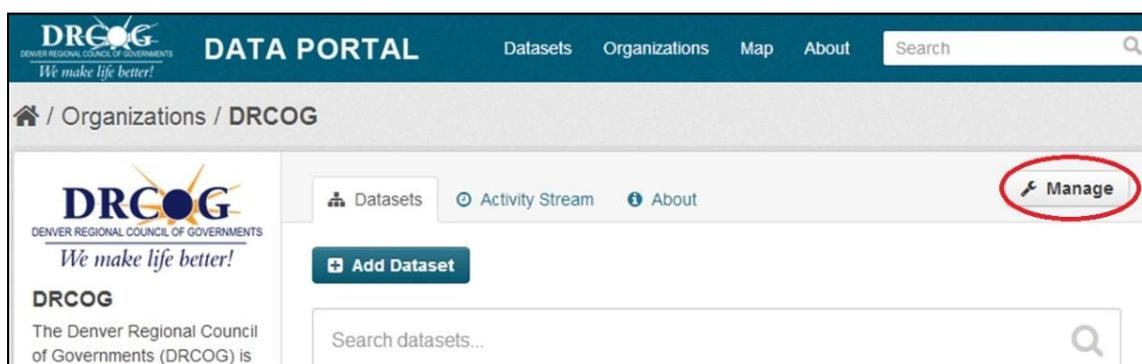
If you will be an organizational administrator, continue reading the following sections. If you will not be an admin, skip to [Registering and Logging In](#).

## Administrator Actions

The administrator of an organization will have the highest-level permissions in the organization. This person is responsible for maintaining the organization's page, inviting users, and serving as the first line of communication between DRCOG and the organization's staff. Additionally, the administrator will be the only member of the organization that can delete data and users. DRCOG recommends that each organization have at least 2 admin users.

## Administering the Organization

If you are the administrator for an organization, you will see a "Manage" button appear on the organization's main page.

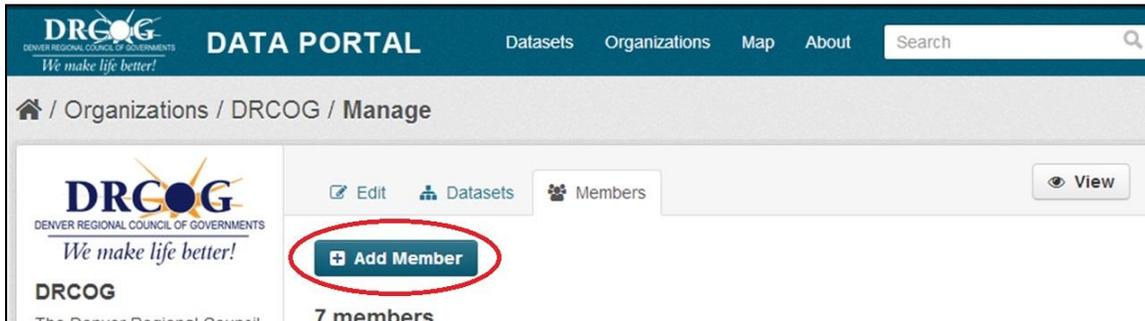


The "Manage" button takes you to page with three tabs; Edit, Datasets, and Members.

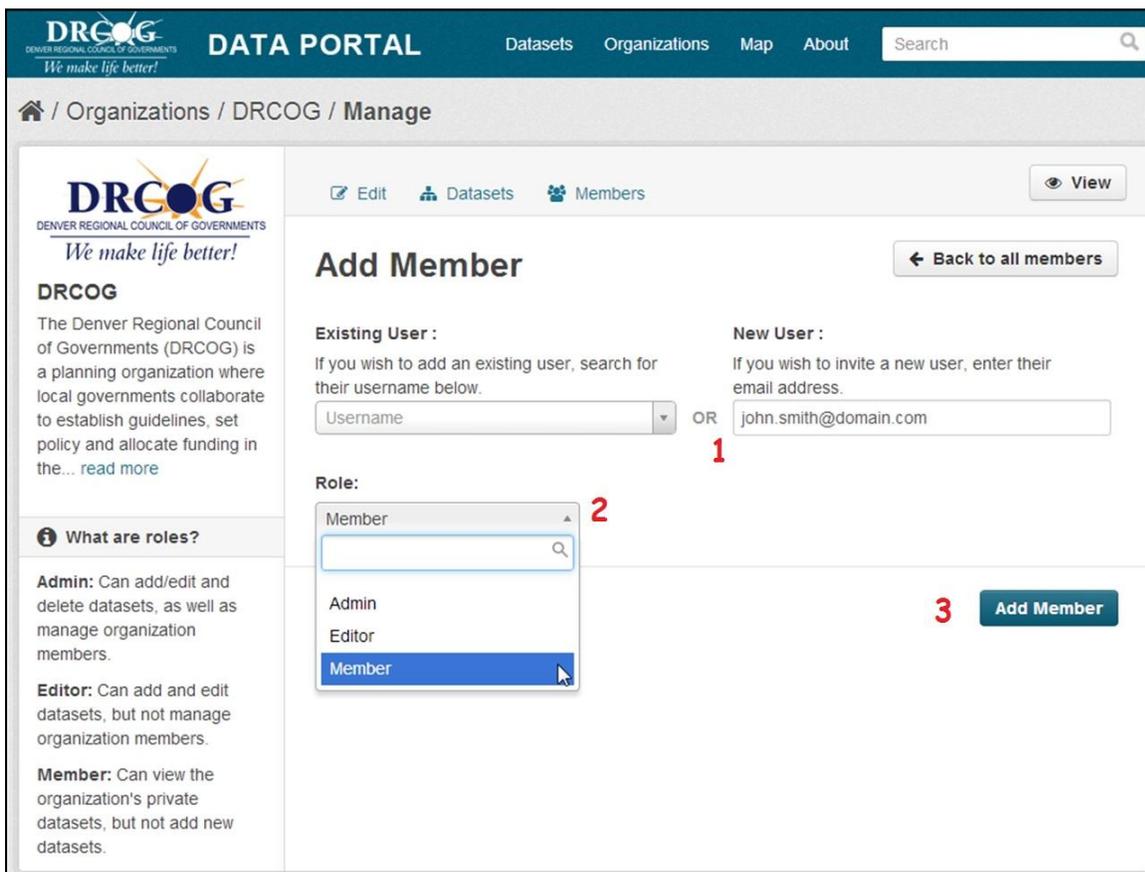
- The "Edit" tab includes the organization name and description. The name and description have already been standardized by DRCOG.
- The "Datasets" tab shows all of the organization's datasets. You can manage dataset visibility and delete datasets from this tab. Refer to [License and Visibility](#) for definitions on public/private visibility.
- The "Members" tab lists all of the members in the organization. You can edit each user's role and delete users. To edit a role, click on the wrench icon. Hit "Update Member" to store changes. The red "X" button will delete the user. A confirmation box appears to confirm the deletion.

## Inviting Users

Only the administrator can determine what role each user for the organization is in. Users cannot determine their own roles or others' roles. To invite a use to the organization, go to the "Members" tab under your organization's page. Click "Add Member".



Under New User, enter in the email address of the member you would like to add to the organization. Select their role (role definitions are found on the left side of this screen). Click "Add Member".



The new user will receive an email notification that they have been added to the organization. The following is a sample of the notification text:

Dear <username>,

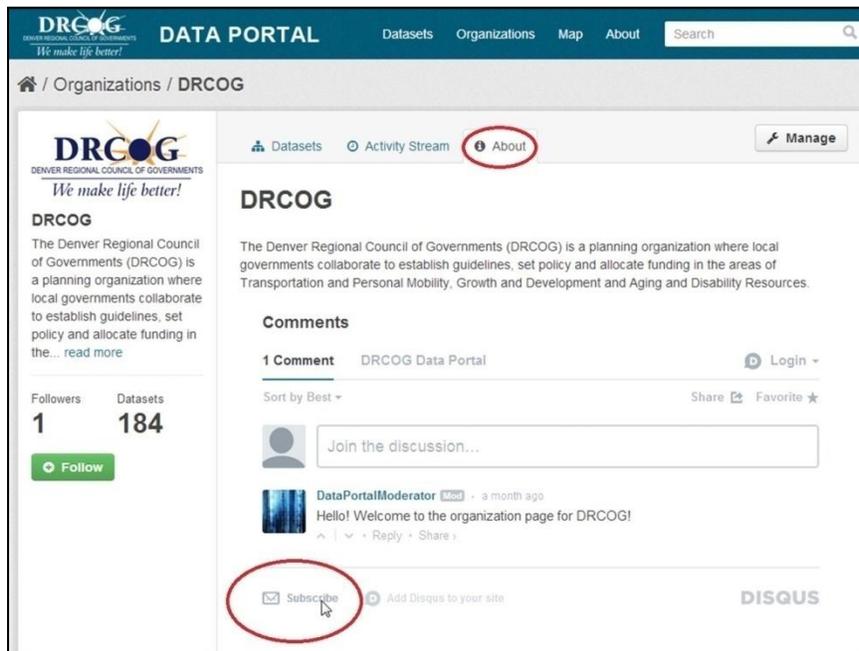
You have been invited to DRCOG Data Portal. A user has already been created to you with the username <username>. You can change it later.

To accept this invite, please reset your password at:

<Link for password reset>

### Setting the Disqus Organizational Thread

As the organizational administrator, comments posted on the organization's page need to be directed to you. You need to subscribe to the comment thread for your organization. Refer to [Setting Up Gravatar and Disqus](#) for instructions on setting up and logging in to Disqus. If the organization's administrator changes, the new administrator will need to subscribe to the thread in order to receive future comments.



## Adding a Data Disclaimer

A DRCOG standardized disclaimer is automatically added to every dataset page. This disclaimer is visible to all users who are downloading datasets. If your organization would like to add additional disclaimers for your data, you can add it on your organization's page. When you are on the organization's page, go to the "Manage" button. Enter your disclaimer in the Description box. When you are finished editing, hit "Update Organization".

The screenshot shows the 'Manage' page for the organization 'DRCOG' in the Data Portal. The page has a dark blue header with the DRCOG logo and navigation links: Datasets, Organizations, Map, About, and a search bar. Below the header, the breadcrumb trail is 'Home / Organizations / DRCOG / Manage'. The main content area is divided into a left sidebar and a right main panel. The sidebar contains the DRCOG logo and a brief description of the organization. The main panel contains a form with the following fields and buttons:

- Edit** button (pencil icon)
- Datasets** button (people icon)
- Members** button (group icon)
- View** button (eye icon)
- Name:** Text input field containing 'DRCOG'. Below it, a URL is displayed: `* URL: dataportal.drcog.org/organization/drcog`
- Description:** Text area containing the text: 'The Denver Regional Council of Governments (DRCOG) is a planning organization where local governments collaborate to establish guidelines, set policy and allocate funding in the areas of Transportation and Personal Mobility, Growth and Development and Aging and Disability Resources.' A red text prompt reads: 'Enter disclaimer here after the organization description'. Below the text area, it says 'You can use Markdown formatting here'.
- Image:** A red button labeled 'Remove'.
- Custom Field:** Three rows of 'Key:' and 'Value:' input fields.
- \* Required field** label.
- Delete** button (red)
- Update Organization** button (blue)

## Following Members

As the administrator for an organization, you will have the option to follow users of your organization. Doing so will mean that your activity feed will be populated with activity for that user. To follow a user, navigate to the Members tab under the Manage page. Click on a user. You will see the green "Follow" button. Click it to begin following the user. When you are following, the button will change to "Unfollow" in red. You can unfollow a user by clicking the "Unfollow".

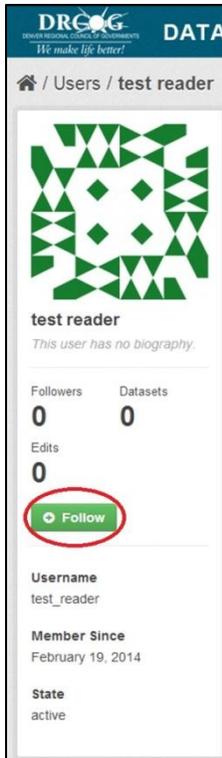
## Changing Visibility and Deleting Datasets

Administrators can change the Visibility of one or more datasets from the same location. Refer to [License and Visibility](#) for more information on the differences between public and private data. From this screen, administrators can also delete datasets. Go to your organization, and click the “Manage” button. Click on the “Datasets” tab. All of the datasets for your organization will be listed.

The screenshot shows the 'Manage' page for the DRCOG organization. The top navigation bar includes 'DATA PORTAL', 'Datasets', 'Organizations', 'Map', 'Inventory', and 'About', along with a search bar. The breadcrumb trail is 'Home / Organizations / DRCOG / Manage'. On the left, there is a sidebar with the DRCOG logo and a brief description of the organization. The main content area features a 'Datasets' tab (circled in red), an 'Add dataset' button, and a list of 184 datasets. Above the list are controls for 'Make public', 'Make private', and 'Delete'. The first dataset listed is 'DRCOG: DRCOG Boundary' with a 'Private' status. To the right, there is a search bar for datasets and a sidebar with 'Organizations' and 'Tags' sections.

Above the list of datasets, there is a “Select All” checkbox. Use caution with this checkbox; if the box is checked, all datasets will be checked and can be deleted or the Visibility could be changed for every dataset.

This close-up view highlights the 'Select All' checkbox (circled in red) located above the 'Make public', 'Make private', and 'Delete' buttons. The 'Datasets' tab is also visible in the background.

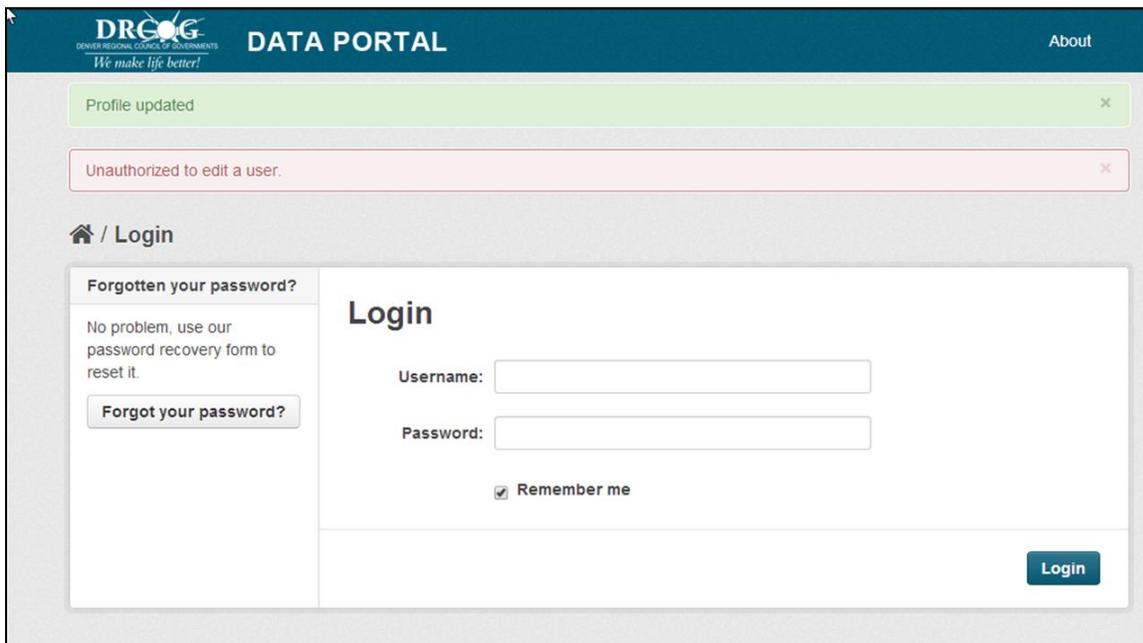


## Registering and Logging In

Registering and logging in is required to interact with the Data Portal's content. The administrator for an organization will invite users to join the organization. Users will then be prompted via email to complete registration. Once registered, the user can login to the site and begin using the Data Portal. The registration process asks for the following information:

- User name: using only letters, numbers, - and \_ characters.
- Full name: to be displayed on your user profile
- Email address: this will not be visible to others
- Password: enter the same password in both boxes

To change your user name, go to "Manage". Edit the user name and hit Update Profile. You will be logged out of the site and redirected to a login screen. You should see two messages at the top of the page. The first message states that your profile was updated. The second message says "Unauthorized to edit a user". This is a known bug in CKAN. You can disregard this message; your profile user name was updated successfully.



## Changing Account Settings

Access your settings by clicking on the Settings tool located in the top right corner of the page. You can change your registration details as well as changing your password. Click “Update Profile” to save changes.



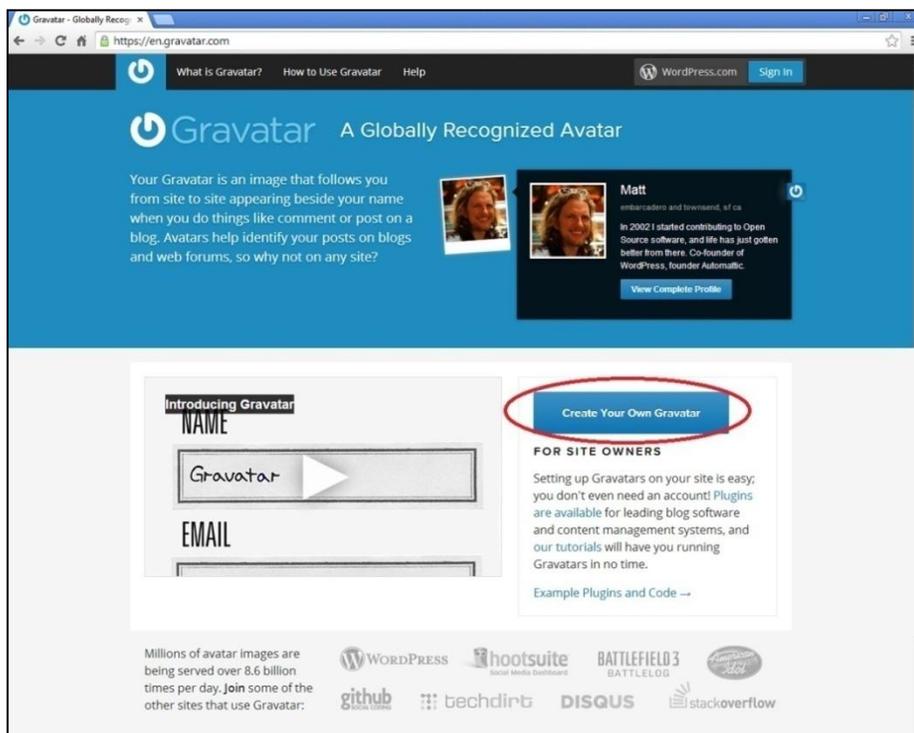
## Setting Up Gravatar and Disqus

The Data Portal uses Gravatar and Disqus for user identification and communication. To leverage the site’s full functionality, you can use your Gravatar and Disqus accounts.

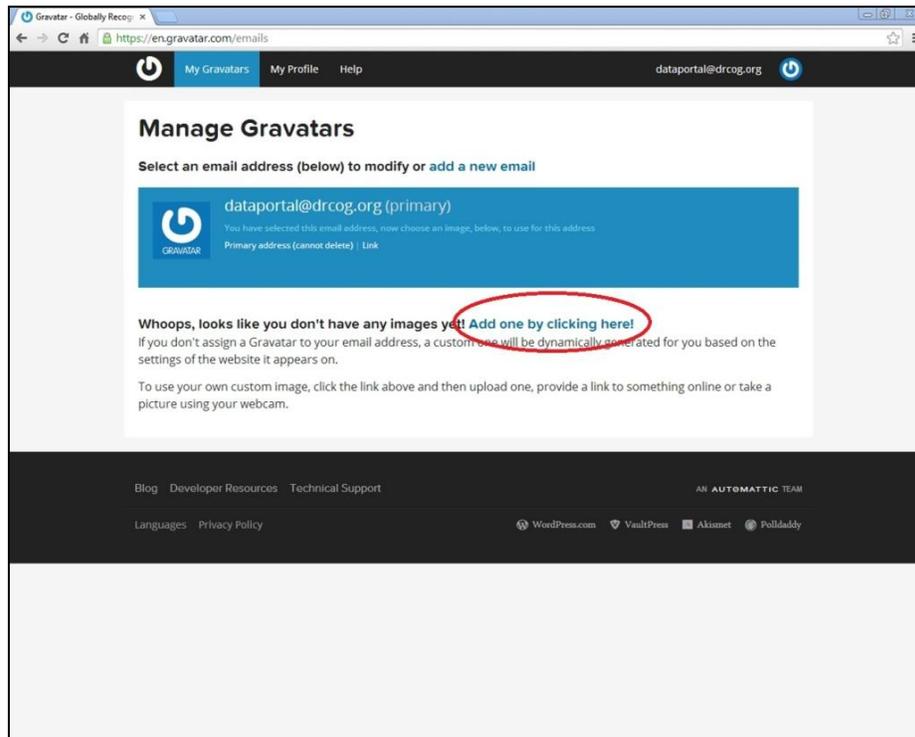
### Gravatar

An avatar is a picture that appears next to your name on websites. With Gravatar, you can upload a profile picture and that picture will be recognized in any Gravatar-enabled site. Gravatar is a free service. The Gravatar follows the email address it is linked to. Follow the instructions below to create a Gravatar.

1. Go to Gravatar.com and Create Your Own Gravatar.



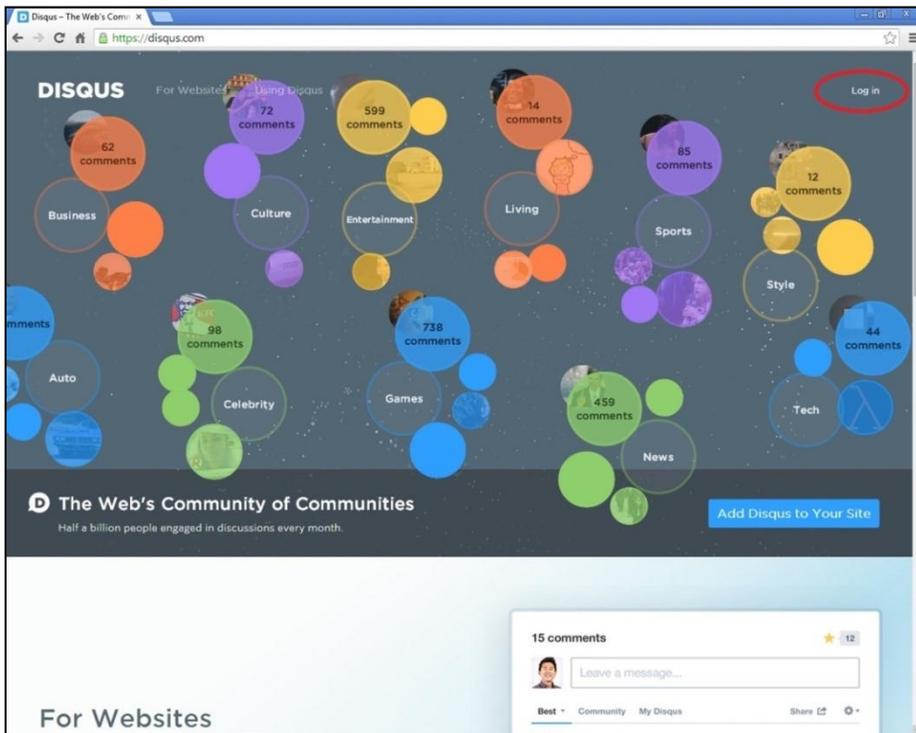
2. Enter your email, username and password. Hit “Sign up”
3. You will receive an email for account verification. Click on “Activate Account” in the email and you will be directed to sign into Gravatar.
4. After signing in, you can add an image to be used for your Gravatar.



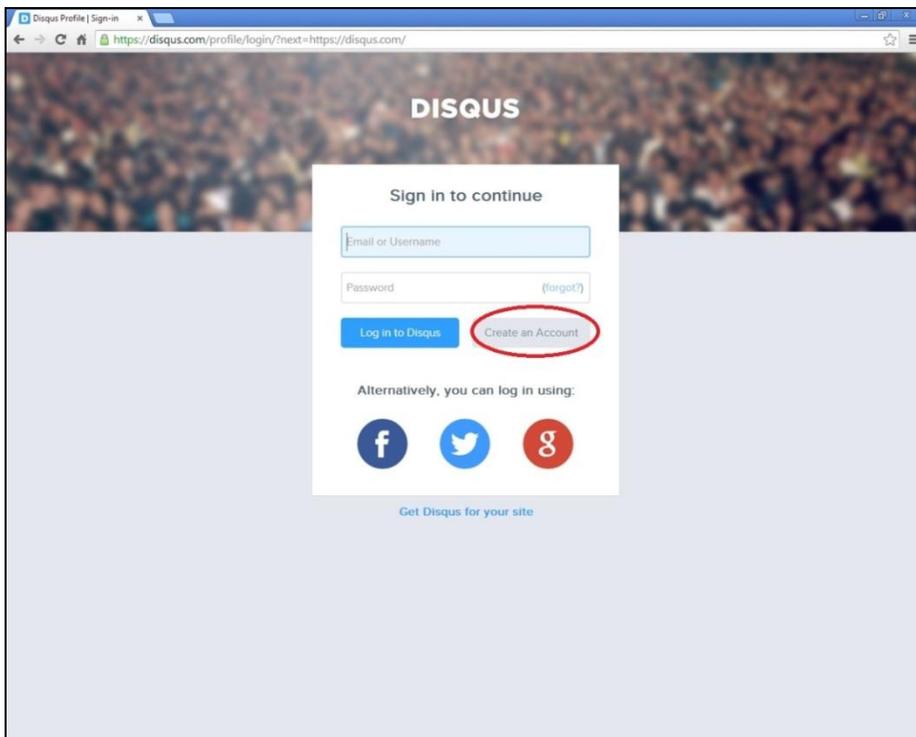
## Disqus

Disqus is a free online discussion system. The Data Portal uses Disqus as a means of conversing about datasets. If you already have a Disqus account, you can login to Disqus after you have logged in to the Data Portal. If you need to register for a Disqus account, follow the instructions below:

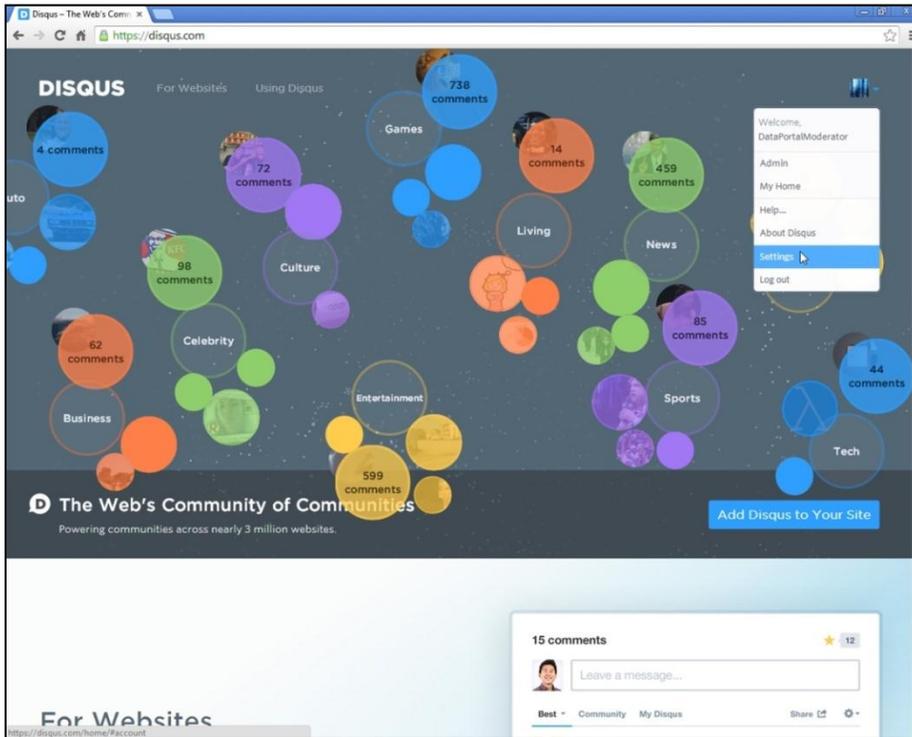
1. Go to Disqus.com and Login (located at the top right corner of the page)



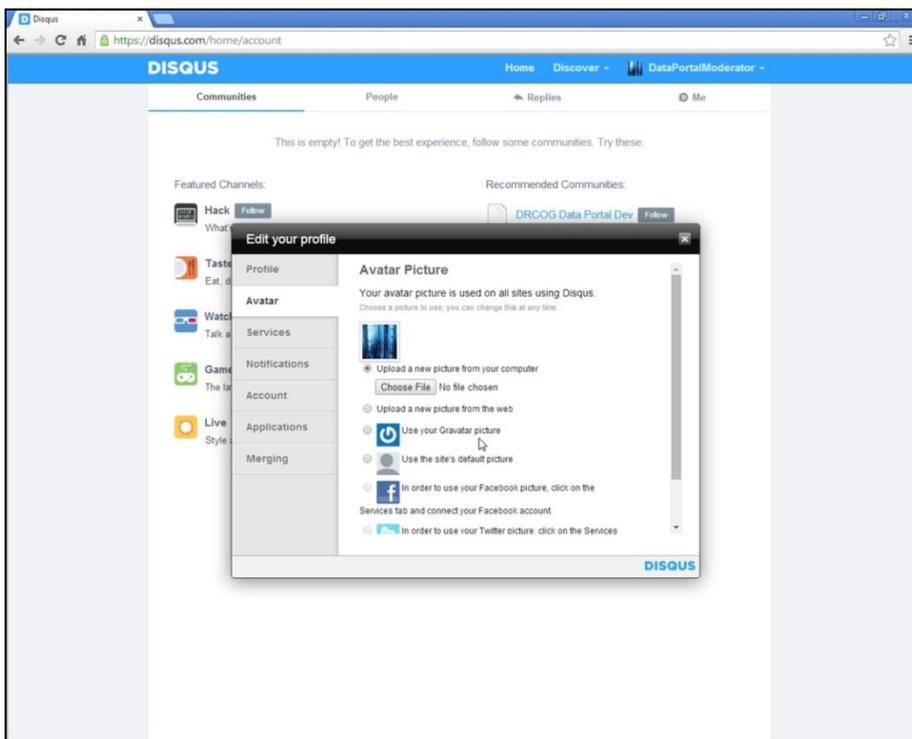
2. Click on Create an Account



3. After you have created an account, go to Settings



4. If you want to change your picture that will appear next to comments you make, go to the Avatar tab. You can upload a picture or user Gravatar or other social media pictures.



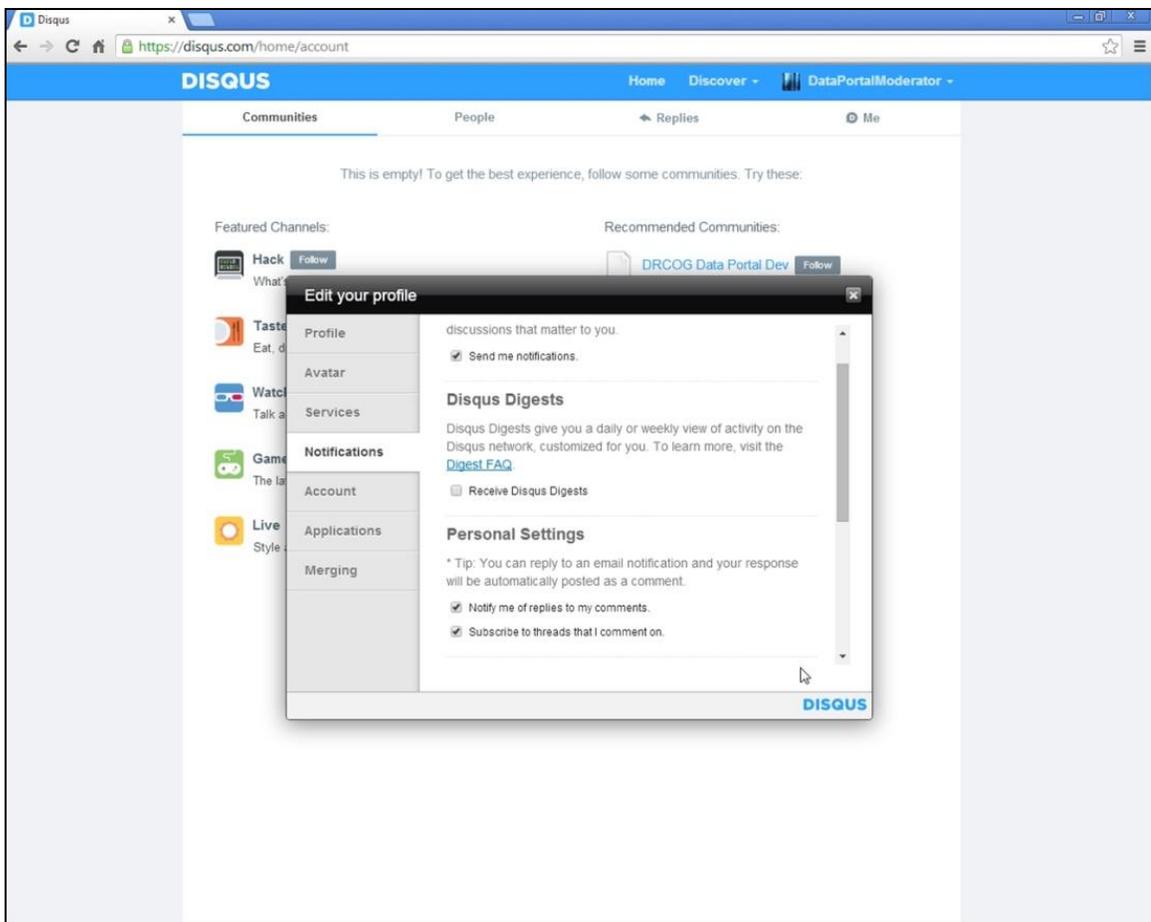
## Best Practices

Keep your Gravatar and Disqus picture the same.

Make sure to sign up for all notifications.

Add Disqus to your safe sender list for your email.

5. On the notifications tab, under “Notifications”, make sure “Send me notifications” is checked. Under Personal Settings, make sure “Notify me of replies to my comments” and “Subscribe to threads that I comment on” are both checked. Save changes.



6. Log out of Disqus. You will now be able to login to your Disqus account through the Data Portal to start commenting on datasets.

The screenshot shows the DRCOG Data Portal interface. At the top, there is a navigation bar with 'DATASPORTAL' and links for 'Datasets', 'Organizations', 'Map', and 'About'. The breadcrumb trail indicates the current location: 'Organizations / Arvada / City of Arvada: Parks'. The main content area is titled 'City of Arvada: Parks' and includes a description, 'Data and Resources' section with links to PDF maps and shapefiles, a list of tags, a disclaimer, and an 'Additional Info' table. The 'Additional Info' table contains the following data:

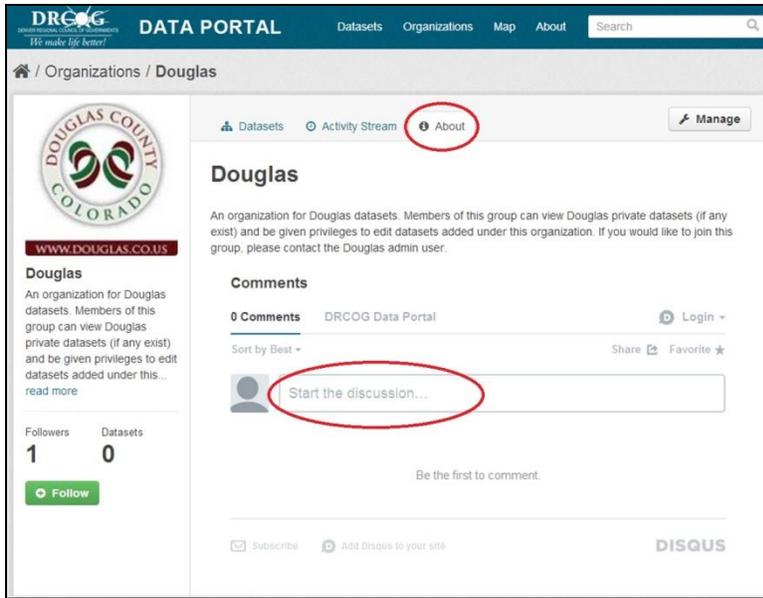
Field	Value
Source	http://arvada.org/opendata/arvada-parks/
Maintainer	maps.arvada.org
State	active
harvest_object_id	6f78003a-39ad-44aa-a59d-0be24986e5a5
harvest_source_id	a8f3f09d-8b2a-4a8a-9732-bf5c2a7cf52a
harvest_source_title	Open Colorado

At the bottom of the page, there is a 'Comments' section with '0 Comments' and a 'Login' button. A red circle highlights the 'Login' button, which has a dropdown menu with options for 'Disqus', 'Facebook', 'Twitter', and 'Google'.

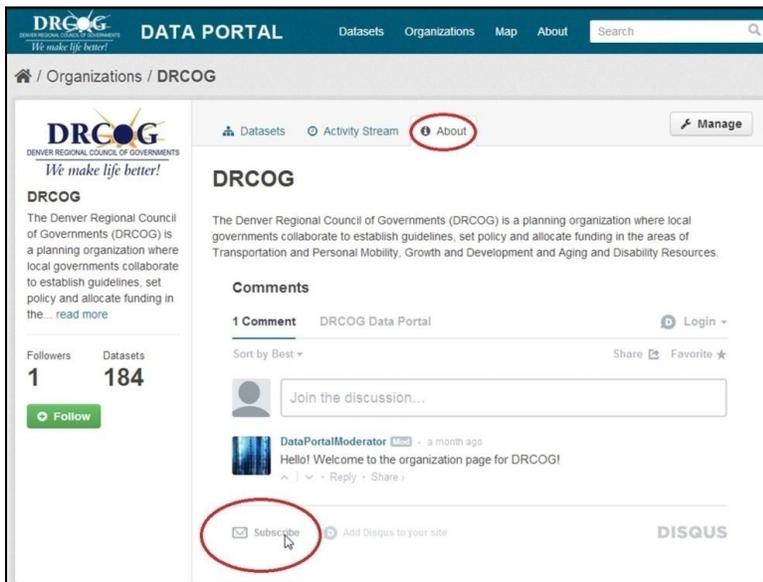
- You will only need to login to Disqus once from the Data Portal. When you login to the Portal in the future, Disqus will recognize your computer and you will be automatically be logged in to Disqus.

### Using Disqus for Commenting

You can comment on a dataset by navigating to the dataset. The Comments section is at the bottom of the page. Comments are made at the dataset level and cannot be made at the resource level. You can also leave comments for an organization. To do this, navigate to the organization. Go to the "About" tab. A Comments section will be shown. Type your comment in the discussion box.



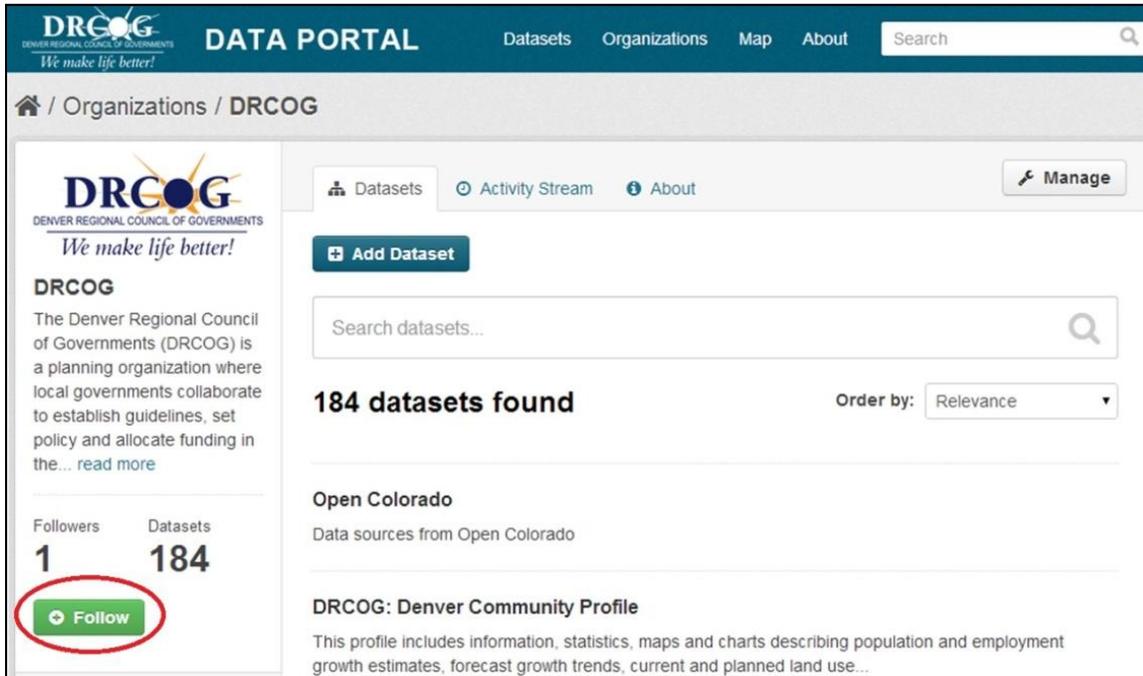
To subscribe to datasets or organizational threads, click on the “Subscribe” text in the Disqus section.



## The News Feed and Following

The News Feed shows a list of activity from items that you follow. You can follow an organization or a dataset. Administrators can also follow members of their own organization.

To follow an organization, click on the organization and click the green Follow button on the left side below the organization description.



To follow a dataset, navigate to the dataset's main page. Click the Follow button. When you are following, the button will change to "Unfollow" in red. You can unfollow and organization or dataset by clicking the "Unfollow".



When you login to the Data Portal, you are directed to the News Feed. To return to this page, click on the dashboard icon at the top right corner of any page within the Data Portal.



## License and Visibility

There are two levels of data sharing in the Data Portal. The License level refers to whether the dataset can be shared with the general public or not. The dataset will be shared as an aggregated, regional layer.

License:

- Do not share with public (default) – choosing this option indicates that you do not want DRCOG to share a regional layer that includes your data.
- Share with public – choosing this option indicates that you approve of DRCOG sharing your data as part of a regional dataset\*

The Visibility level refers to whether other organizations in the Data Portal have access to the dataset.

Visibility:

- Private – only DRCOG and your organization can see this data on the site
- Public – other members of the site (e.g. other local jurisdictions) can see the data but the public cannot

\*A regional dataset will have undergone several changes, including formatting and standardization.

		Visibility	
		Private	Public
License	Do not share with public	The data can never be shared with the public. If it is compiled into a regional dataset, it is for internal DRCOG-use only. DRCOG is the only other entity besides the owner that can see the data on the Data Portal site.	The data can never be shared with the public. If it is compiled into a regional dataset, it is for internal DRCOG-use only. Other members of the site can see this data in their search results.
	Share with Public	The data can be shared with the public after it has been compiled into a regional dataset by DRCOG. In its original form (as uploaded by the owner), it is only visible to DRCOG. Other members of the site do not have access to it.	The data can be shared with the public in its original form and/or after it has been compiled into a regional dataset by DRCOG. Other members of the site can see this data in their search results.

When you upload a dataset, the explanations of both levels are found next to the selection. You will select the appropriate choice for each dataset. **The license cannot be changed after a dataset is uploaded. If you need to change the license level, contact**

**DRCOG.** This is setup so that DRCOG can be informed of changed sharing restrictions. Otherwise, we would not be aware of changes to your license requests.

1 Create dataset 2 Add data 3 Additional data

Title: eg. A descriptive title  
URL: dataportal.drcog.org/dataset/<dataset>

Description: eg. Some useful notes about the data  
You can use Markdown formatting here

Tags: eg. economy, mental health, government

License: Do Not Share With Public

Visibility: Private

Organization: drcog

Cancel Next: Add Data

**i** One of DRCOG's goals is to create regional datasets and serve them to the general public through the Regional Data Catalog. By choosing "Share With Public," you indicate that this specific dataset can be compiled and standardized with other local data to make a publicly-shareable regional dataset (this is the preferred choice). If this dataset is being shared with DRCOG for internal-use only, please choose "Do Not Share With Public" (this is the default). The selected choice will become a "tag" on the data that DRCOG will use for data management.

**i** Choosing "Private" will restrict the dataset to your organization. Users associated with your organization (including DRCOG) will be able to search for, view, and download this data. Choosing "Public" will restrict the dataset to the site. All users of the DRCOG Data Portal will be able to search for, view, and download this data. This data will not truly be "public" in that it will not be accessible to the general public.

## Naming Conventions

### Datasets

Each dataset must have a unique name. Make dataset titles descriptive. Include the organization name and year of the dataset. Consider the example of adding a buildings dataset.

Dataset Title: **Buildings** 

This title is not descriptive enough. There could be multiple users trying to use this same title.

Dataset Title: **Arvada: Buildings 2014** 

This title is descriptive and unique. It includes the area of interest, subject, and date.

## Resources

Resources should be named with the same title as the dataset they belong to and include additional description for the resource content. For example, in the dataset “Arvada: Buildings 2014”, several resources in the dataset may be named as follows:

- Dataset Name: Arvada: Buildings 2014
  - Resource Name: Arvada\_Buildings\_2014.zip (containing the shapefile)
  - Resource Name: Arvada\_Buildings\_2014\_Metadata.txt
  - Resource Name: Arvada\_Buildings\_2014\_Data\_Dictionary.xlsx

## Tags

Tags are used to filter related data. Hit the <return> key between tags. You can use the delete button to remove tags. Tags are not required but highly recommended. The preferred format for tags is lower-case. Using different cases will create different and unique tags. Here are some examples and recommended tags to be used for the Data Portal:

- buildings
- parcels
- land use
- zoning
- bike
- certificate of occupancy
- boundaries
- license agreement

## Formats

CKAN supports many file formats. When you upload a dataset, CKAN will read the file extension and automatically populate the format type into metadata. Shapefiles and geodatabase data will need to be zipped prior to uploading. If a zipped file is uploaded to the Data Portal, the format needs to be changed to the appropriate file extension.

### Best Practices

Keep tags in lowercase format

Format tags for spatial data should be the original extension, not .zip

## License Agreements

There may be license agreements to use an organization's data. There may also be license agreements from DRCOG in order to share certain datasets with members. The Data Portal will be a central repository for such agreements. A license agreement can have two pathways.

### *Organizational-Level License Agreement*

In this agreement, all data shared by an organization falls under the umbrella of the license agreement. DRCOG will add a public dataset to the organization, titled "License Agreement" (with the same tag name). The agreement will be added as a dataset resource.

### *Dataset-Level License Agreement*

In this agreement, the License Agreement will be added as a resource to the dataset of relevance. The dataset may be private or public.

## The Differences in Dataset Lists

Throughout the site, you will see lists of the different datasets. Depending on where you are in the site, you will see a different dataset list.

<http://dataportal.drcog.org/user/<user name>> - shows all the datasets that you have created, started to create, or deleted, in alphabetical order

<http://dataportal.drcog.org/dataset> - shows all the datasets that you have access to, including:

- Your finished data (not drafts)
- Finished datasets created by other site users that have been marked as "public" in the visibility option
- Finished datasets created by other site users that are associated with an organization that you are a member of

<http://dataportal.drcog.org/organization/<organization name>> - for organizations that you are a member of, you will see all finished datasets uploaded by the organization, including "public" and "private"

Dataset counts only refer to public datasets.

## Adding a New Dataset

You can access the “Create Dataset” page by selecting “Datasets” at the top of the page. From here, select “Add Dataset”. You can also access this page by going to your organization and selecting “Add Dataset”. You can only access this feature if you are an editor or admin for your organization. Members do not have permissions to add data.

Enter a title, description, and tags for the dataset. Choose the License and Visibility levels (see [License and Visibility](#) section for more information).

The organization will be defaulted to your organization.

Hit “Next: Add Data”.

On the next page, select to link to a file or upload a file (this is the most common option). Enter the name of the resource, description, and format for the resource you are adding. Check the disclaimer prior to moving to the next step.

If you have multiple resources to add, you can click “Save & add another” and repeat the process.

When you are finished adding resources, click “Next: Additional Info”. The last page contains additional, optional fields. When you are done, click “Finish”. If you select “Previous” to go back, the data you entered will not be saved.

1 Create dataset    2 Add data    3 Additional data

Author:

Author Email:

Maintainer:

Maintainer Email:

Custom Field: Key:  Value:

Custom Field: Key:  Value:

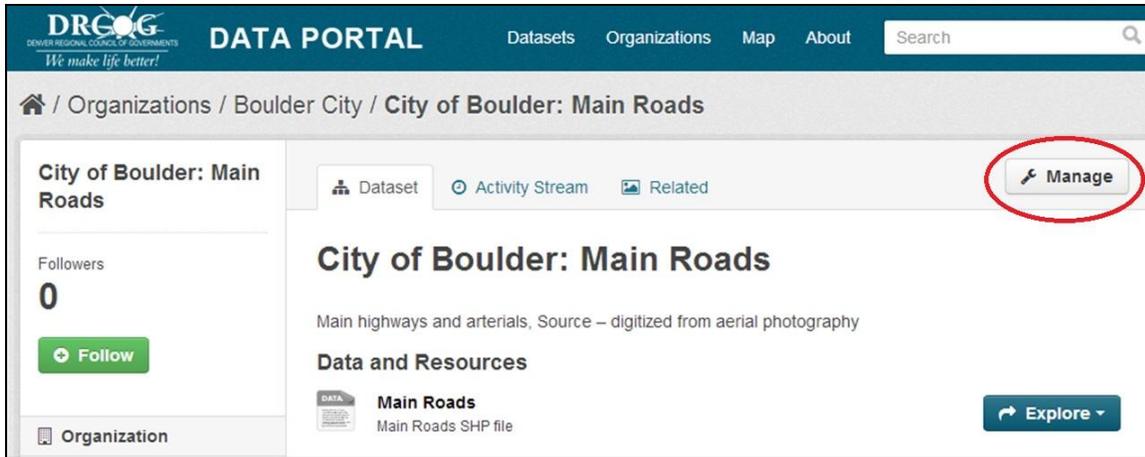
Custom Field: Key:  Value:

### Best Practices

After you add a dataset, subscribe to the comment thread. This will ensure that when users post questions on the dataset, you are notified.

### Editing an Existing Dataset

You can edit datasets you have created or those belonging to the organization that you are a member of. You must be an editor or admin. To edit, go to the dataset's page. Select the "Manage" button located in the top right.



Edit the dataset as needed. The main reasons why a dataset would be edited include changing visibility preferences, names, and adding resources. From here, you can edit the dataset metadata or its resources. When finished, click the “Update Dataset” button to save your changes.

### *Editing or Deleting a Resource*

If you want to add an additional resource, go to the “Resources” tab and select the “Add New Resource” button. You will be directed to add the resource and enter in the description and format information. Hit “Add” to complete.

You can also edit existing resources by selecting it. Hit “Update Resource” when finished. To delete the resource, select the red “Delete” button located on the bottom left.

## Deleting a Dataset

To delete a dataset, go to the “Manage” page. Select the “Delete” button located at the bottom left side of the page. You will be prompted to confirm or cancel this action. The deleted dataset is not completely deleted. It is hidden so that it is not visible in searches, but the URL for the dataset page can still be seen and undeleted if needed. The site administrator (DRCOG) can permanently delete datasets and resources. DRCOG will periodically purge deleted datasets.

## Searching the Site

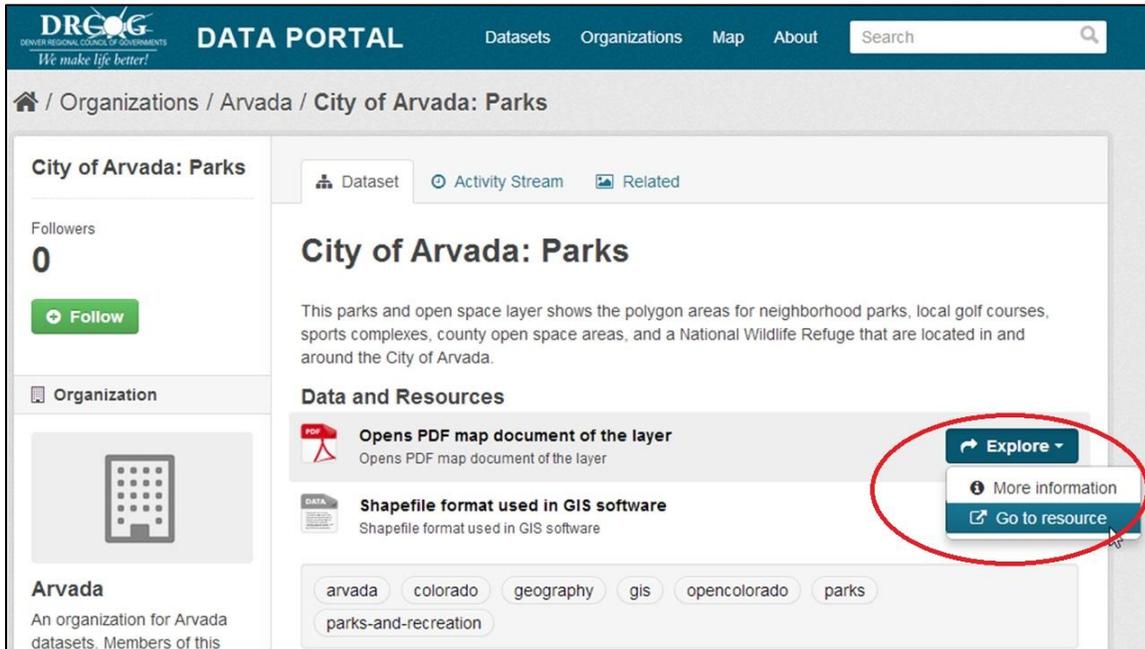
The search bar allows you to search for datasets or organizations. Private datasets that are added to the site will not be listed in the dashboard, the organizational activity stream, or the user activity stream. You cannot search for private datasets.

## Downloading Data

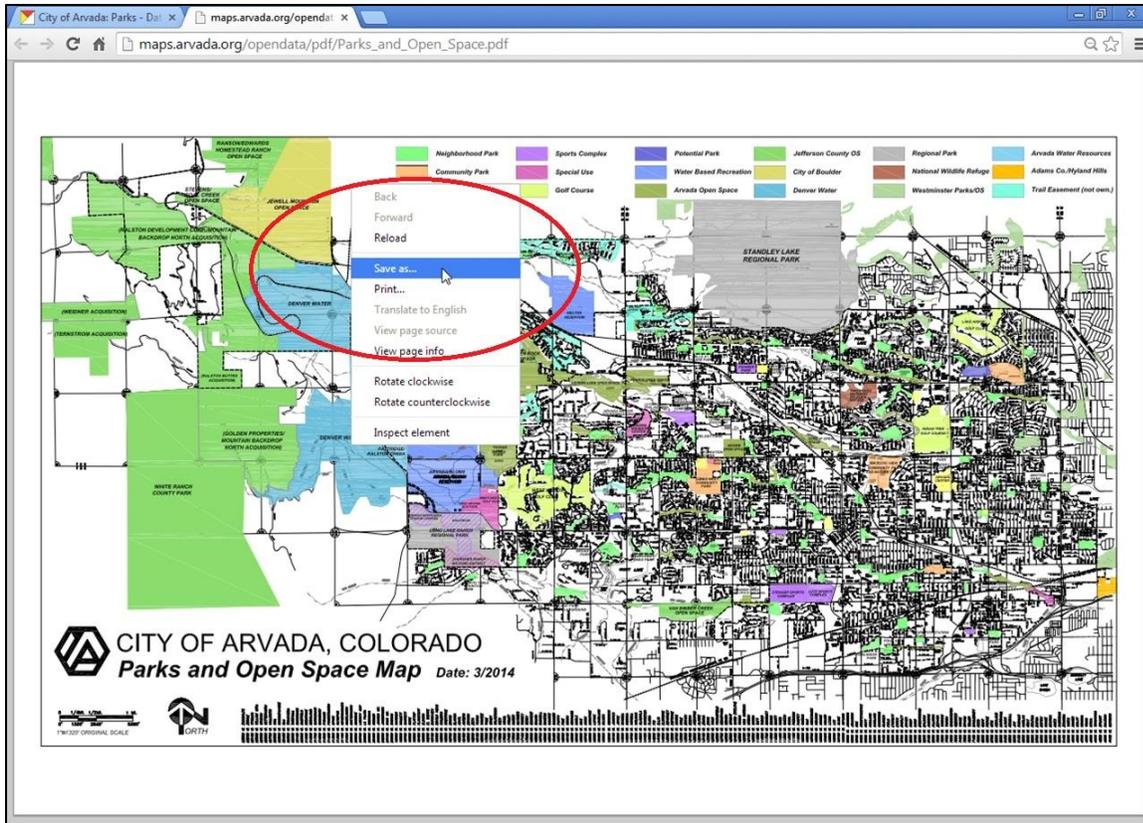
To download data, select the dataset of interest (refer to [The Differences in Dataset Lists](#) for the various methods to reach datasets). On the dataset’s main page, the dataset description and

The screenshot shows the 'Edit' page for a dataset in the DRCOG Data Portal. The dataset is titled 'City of Boulder: Main Roads'. The page includes a navigation bar with 'Datasets', 'Organizations', 'Map', and 'About'. The main content area has tabs for 'Edit metadata' and 'Resources'. The 'Edit metadata' tab is active, showing fields for Title, Description, Tags, License, Visibility, Organization, Source, Version, Author, Author Email, Maintainer, and Maintainer Email. A red circle highlights the 'Delete' button at the bottom left, and an 'Update Dataset' button is at the bottom right. There are also informational messages on the right side of the page.

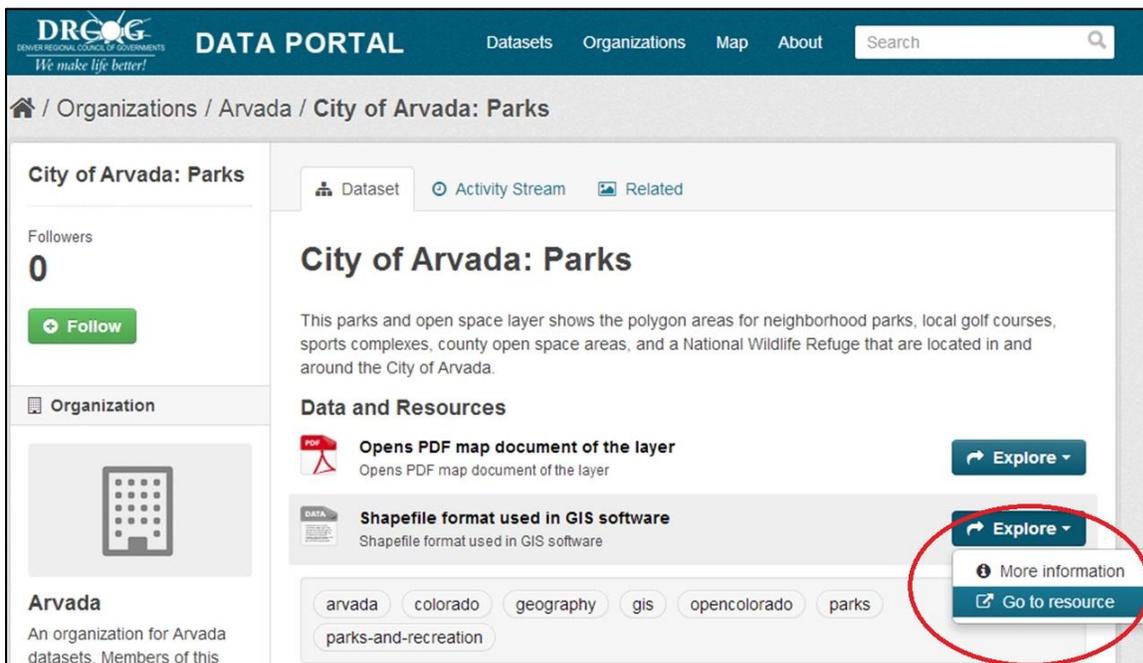
resources are listed. Some datasets (such as CSV file formats), can be previewed, by clicking on the Explore button and selecting “Preview”. Shapefiles cannot be previewed. To download the data, select “Go to Resource” (if originates from Open Colorado) or “Download” (if originates from the Data Portal site).

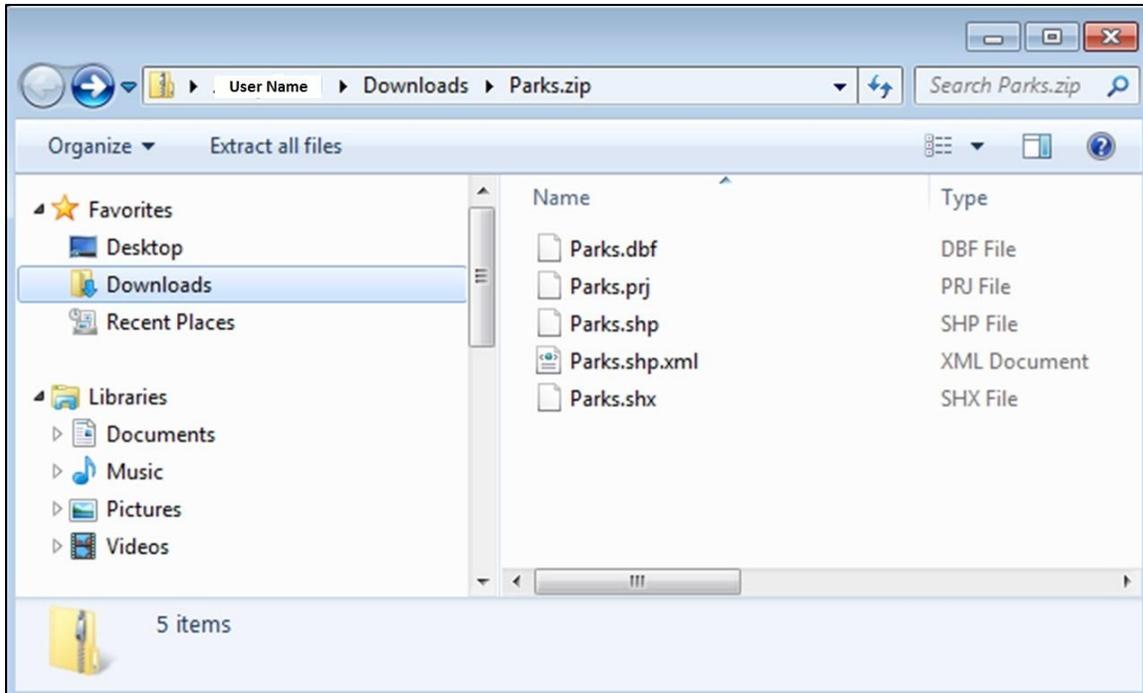


For documents that can be opened in a browser, such as text file or pdf, the resource opens in another browser window. Right click and select Save As.



For all other documents, the download action prompts the Windows explorer Downloads folder.





## Map

The “Map” section displays a count of datasets for each jurisdiction on the Data Portal. The default display includes all datasets (private and public). Under the Tools dropdown menu, users can select to filter by public, private, or all datasets. Upon selection, the header near the top of the map changes to reflect the user’s selection. In the Table of Contents, the display can be switched from County (default) to Municipality layers. Users can also use the search bar to zoom to a specific jurisdiction.

