

## Biodata Management Guide Technical Documentation

Dan Randow, 18 November 2013. [CC BY 3.0](#) TFBIS project 263: Biodata Management Framework: Phase Two.

### About this Document

This document describes how the current version of the Biodata Management Guide t <http://dataversity.org.nz/guide> is implemented so that it can be maintained and extended. It also describes a roadmap for improving the implementation.

### Participate in Maintaining the Guide

To participate in maintaining the Guide, please contact Dan Randow [dan@onlinegroups.net](mailto:dan@onlinegroups.net) for access to the data repositories that are used by the Guide.

### User tasks

The main use cases for the Guide are as follows.

- Assess the current state of a biodata system
- Plan improvements to a biodata system

More specific use cases for the Guide are as follows.

- Make a quick assessment and plan.
- Review reference information while making an assessment and plan.
  - Learn more about the factors that determine maturity.
  - Find ways to improve a biodata system.
- Make a progressively more detailed assessment and plan.
- Make a very detailed assessment and plan in a particular area of a biodata system.
- Work on a partially completed assessment and plan.
- Collaborate remotely on an assessment and plan.
- Produce a human-readable report on an assessment and plan.

Maintain the Guide

- Edit maturity criteria.
- Add or edit information to assist with assessing and planning improvements to a biodata system.

### Current Implementation

The Guide has the following components.

- Axes

- Criteria
- Home page
- Assessment form
- Mini-guide
- Reference document

The Assessment Form and Reference document are dynamically generated from data sources containing axes, criteria and xml content.

## Axes

The axes are currently located in two places.

- Google spreadsheet
- Zope object database (ZODB)

The process for editing the axes is as follows.

- Edit in spreadsheet
- Import manually into ZODB

## Criteria

The criteria are currently located in two places.

- Google spreadsheet
- Zope database (ZODB)

The process for editing the axes is as follows.

- Edit in spreadsheet
- Import using script into ZODB

## Home page

### Assessment form

Google spreadsheet.

Gets axis and criterion data from Google Spreadsheet.

Links to Reference document.

### Mini-guide

Open document → PDF.

### Reference document

Generated by python script from axes and criteria in ZODB. Also accesses descriptions, references and resources as XML snippets from the ZODB.

XML for the references is generated using a spreadsheet.

## Procedures

### Editing Criteria

Edit criteria in the Criteria sheet of [https://docs.google.com/spreadsheet/ccc?key=0AtEQMHbJqkl6dHJ4aTZIRFMwa003S250VF84dTlhWGc&usp=drive\\_web#gid=0](https://docs.google.com/spreadsheet/ccc?key=0AtEQMHbJqkl6dHJ4aTZIRFMwa003S250VF84dTlhWGc&usp=drive_web#gid=0)

In the Criteria sheet, copy the range A1:E253.

In a Libre Office spreadsheet, paste the range into a blank sheet.

Insert a column to the right of col C "Factor". Name the new column "ID".

In row 2 of the ID column (now col D) enter the formula "`=A2&B2&C2`". This should create a single ID with three numeric values (ie '000').

Copy that formula to the range D3:D253.

Copy the range D2:D253 and use Paste Special to paste the numbers (not the formulas) back over the same range.

Delete columns A, B and C.

Save the sheet as a csv file ensuring that all text cells are delimited with double quotes. Check this in a text editor. The first two rows should look like the following.

```
"Id", "Title", "Definition"  
"000", "Maturity", "Efficient management of data to ensure fitness for purpose."
```

Visit the upload script at

[https://zmi.onlinegroups.net/sites/onlinegroups/Content/dataversity/guide/data/batch\\_update\\_locations/manage\\_workspace](https://zmi.onlinegroups.net/sites/onlinegroups/Content/dataversity/guide/data/batch_update_locations/manage_workspace) and ensure that `DRY_MODE = True`.

Visit the upload form at

[https://zmi.onlinegroups.net/sites/onlinegroups/Content/dataversity/guide/data/batch\\_update\\_locations\\_form/pt\\_editForm](https://zmi.onlinegroups.net/sites/onlinegroups/Content/dataversity/guide/data/batch_update_locations_form/pt_editForm) and use it to do a test upload. Check that the feedback is correct.

In the upload script ensure that `DRY_MODE = False`.

Use the upload form to upload the data.

## Future Implementation

## Axes

Move to ZODB as primary repository. Make interface for editing them via <http://dataversity.org.nz/guide>.

## Criteria

Move to ZODB as primary repository (note that it is quite easy to edit them in a spreadsheet as they can be viewed in different groupings). Make interface for editing them via <http://dataversity.org.nz/guide>.

## Home page

## Assessment form

Move to using ZODB as primary repository. Implement at <http://dataversity.org.nz/guide>.

## Mini-guide

Get this auto-generated from the ZODB.

## Reference document

Add summary tables like the ones in the Mini-Guide (or make the mini-guide the intro to the Reference document?).

Make it easier to publish the Reference as a PDF.

Improvements to the code:

- Generalise the functions e.g. getting coordinates from the current axes.
- Tidy up how the ids are generated.
- Consider moving axis items to locations (ie where the criteria are). Update code to get them from there.