A HANDBOOK FOR ARGOS ADMINISTRATORS:

How to create Blueprints, Templates and Configurations

Purpose

The purpose of this handbook is to provide guidance on how to create dynamic content in Argos and improve efficiency of daily research management activities

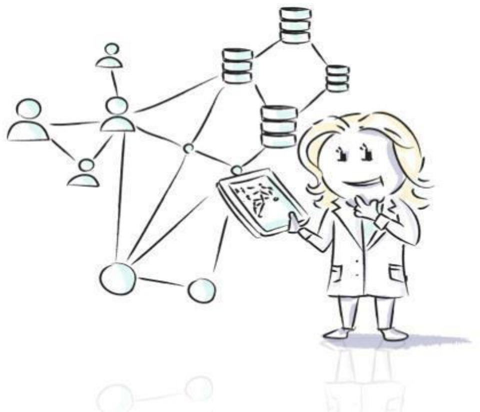
Version 2.0

About

ARGOS is an open and extensible service based on OpenDMP software that simplifies the management, validation, monitoring and maintenance of Output Management Plans (OMPs), such as Data Management Plans (DMPs) or Software Management Plans (SMPs). It is the first service connected to a knowledge graph (see OpenAIRE Graph) and applied the FAIR principles to the OMPs/ Management Plans. Here, researchers find curated templates by data stewards, research support staff, research funders and institutions to create and follow their plans together with their peers.

App Website

https://argos.o



Argos Powered by Athena Research and Innovation team ™

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List of Abbreviations

Abbreviation	Definition
API	Application Programming Interface
DMP	Data Management Plan
EOSC	European Open Science Cloud
FAIR	Findable, Accessible, Interoperable and Re-usable
JSON	JavaScript Object Notation
PID	Proportional–Integral–Derivative controller
RDA	Research Data Alliance
ROR	Research Organization Registry

Blueprint

The Blueprints used to create any Plan in **ARGOS** are available to view and edit from the Plan Blueprints collection. To create new blueprints, you can import a file of an existing blueprint (e.g. from a different tenant/instance) or create a new one as it is shown below.

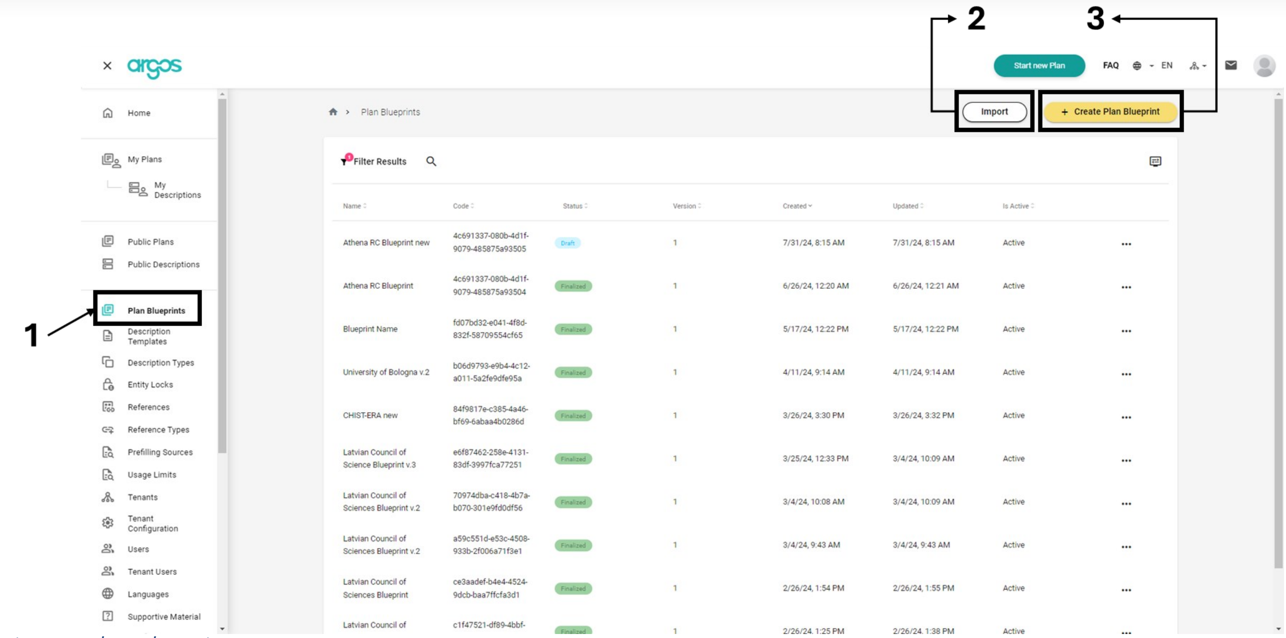


Figure 1 Plan Blueprint

1. Select *Plan Blueprint* from the menu on the left side of the screen
2. [Import]() or
3. [Create Plan Blueprint]()

A. Import a Plan Blueprint

✓ **Click** the *[Import Button]()*

✓ **Upload** the *File* of your Template (.xml)

✓ **Give a Name** to your Blueprint

✓ **Click** *Import* to finish the uploading process

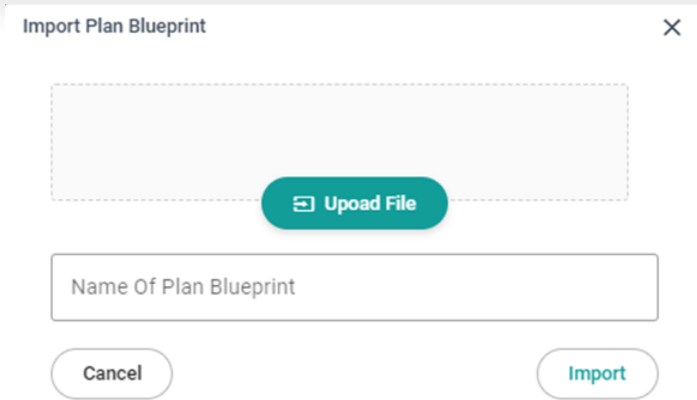
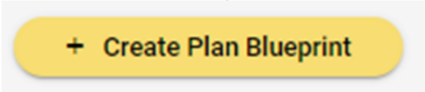


Figure 2. Import a Plan Blueprint

B. Create Plan Blueprint

To create the Plan Blueprint from scratch, click the yellow button *Create Plan Blueprint.* 

Workflow

ARGOS Plan Blueprint is created in one step.

1. Create Section

First, give a *Name* to identify the blueprint. Then, create a section, name it and describe its scope.

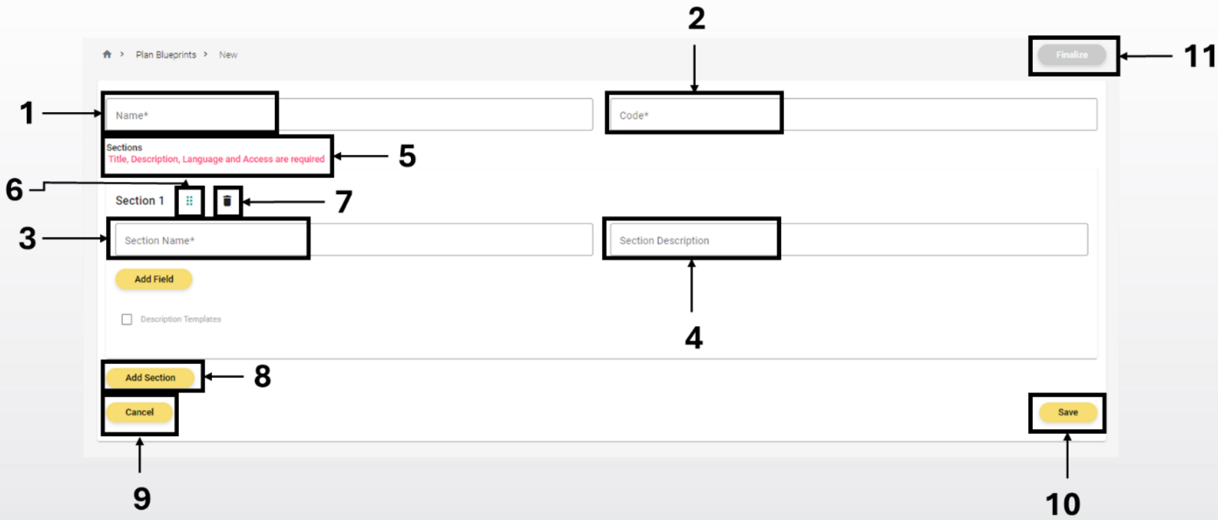


Figure 3. Creation of a Plan Blueprint

1. **Name –** *the name of the New Plan Blueprint*
2. **Code –** *the unique id of the New Plan Blueprint*
3. **Section Name –** *the name of the section*
4. **Section Description –** *describes the content of the section*
5. *The required fields which should be included in a Plan Blueprint*
6. **Dots** – *reorders the section*
7. **Bin button** – *deletes the section*
8. **Add section –** *adds a new section*
9. **Cancel -** *rejects the New Plan Blueprint*
10. **Save -** *saves the new content in the Plan Blueprint*
11. **Finalize –** *finalises the Plan Blueprint and publishes it*

2. Add fields in the Section

Click on *Add field* button to select the *Field type* that you need. There are three types of fields: *System, Custom* and *External Reference*.

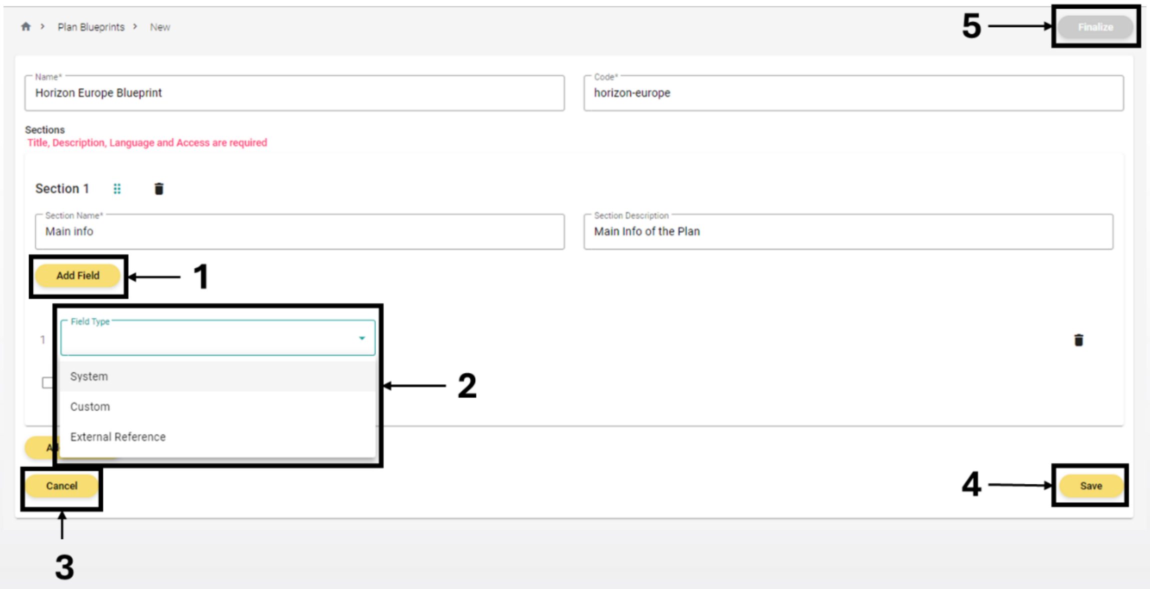


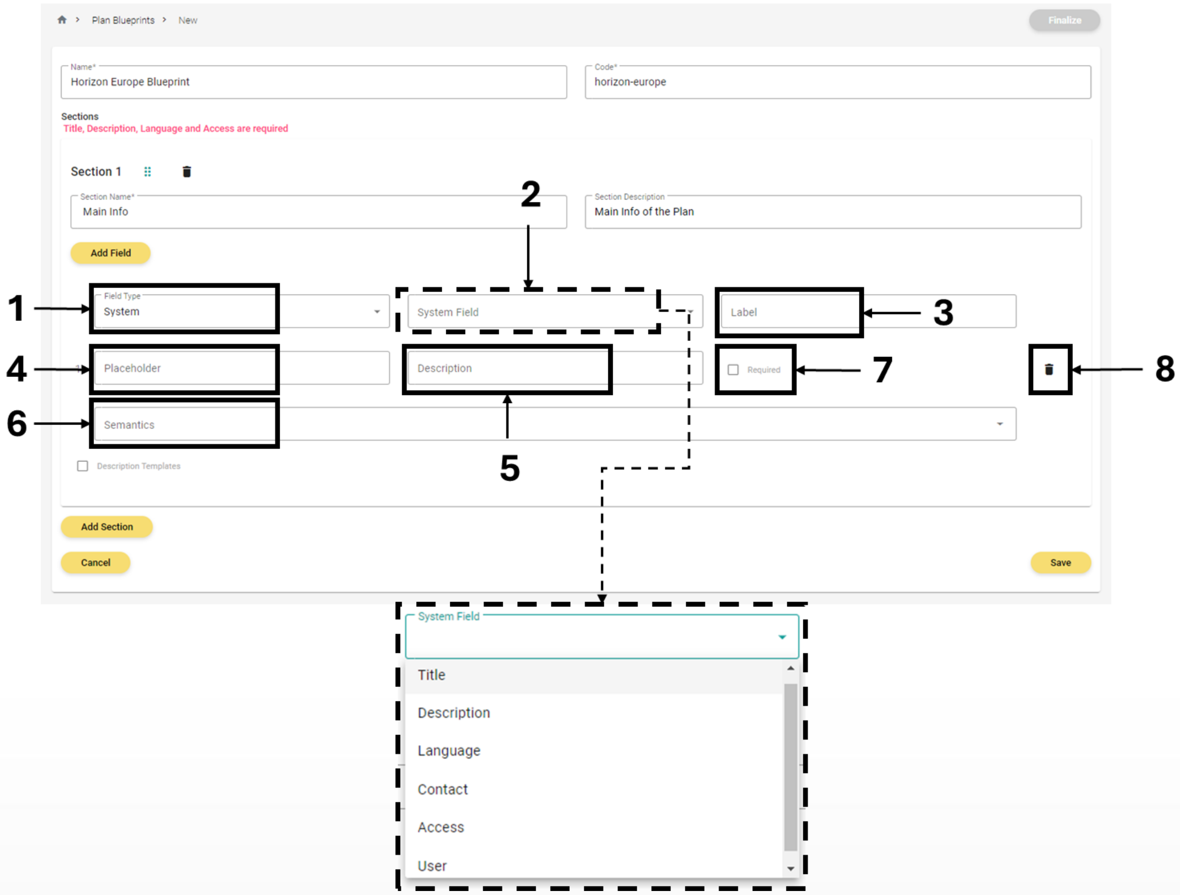
Figure 4. Add field

1. **Add field** – *adds a new field in the Section*
2. **Field Type** – *specifies the three types of fields*
3. **Cancel** – *rejects the New Plan Blueprint*

4. **Save** – *saves the new content in the Plan Blueprint*
5. **Finalize** – *finalises the Plan Blueprint and publishes it*

2.1. System fields

The *System* includes **ARGOS'** fields that are required for a Plan.



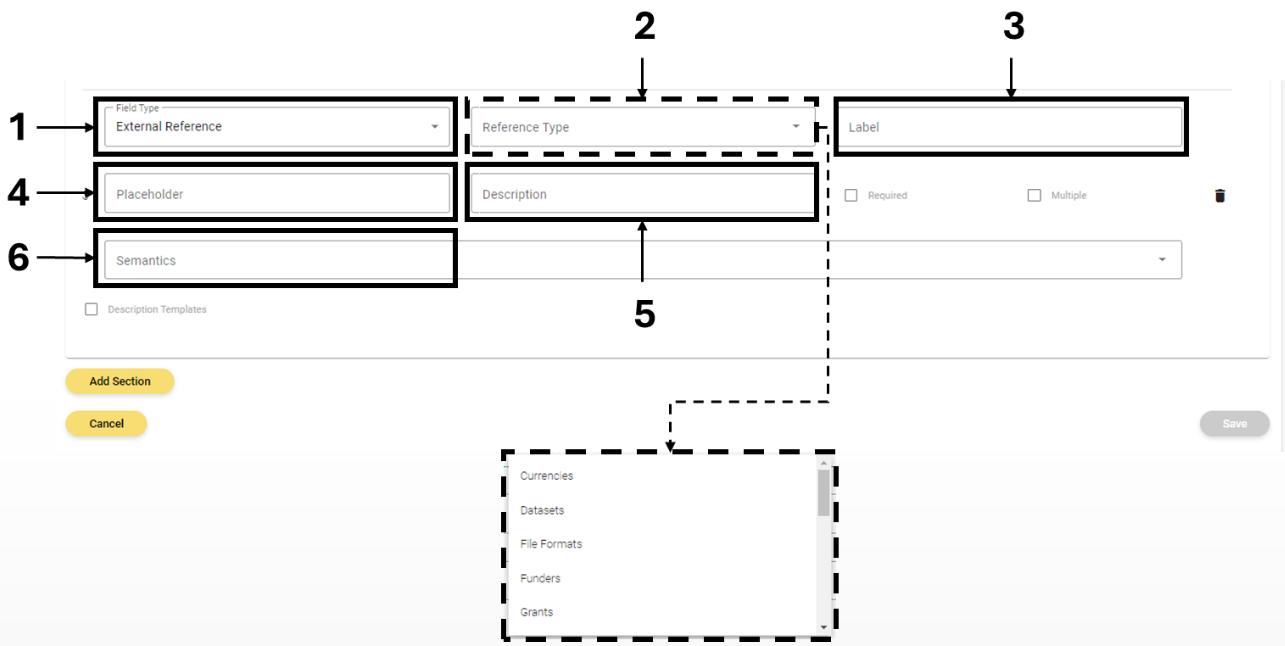
1. **Field Type** – *includes the types of fields*
2. **System Field** – contains *the fields which are necessary in a creation of Plan Blueprint*
    a. **Title** – *the title of the project*
    b. **Description** – *describes briefly the project*
    c. **Language** – *the language used in the plan*
    d. **Contact** – *contact person for the plan*
    e. **Access** – *defines access rights* for *the plan*
    f. **User** – *the users and their roles in the plan*
3. **Label** – *the name of the field*

4. **Placeholder** – *instructions in the field*
5. **Description** – *provides a description of the field*
6. **Semantics** – *links your activity to other research outputs, activities and people*
7. **Required checkbox**– *indicates if the field will be mandatory to be completed* or not
8. **Bin button** – deletes the field

2.2. External Reference

The *External Reference* provides a list of key **ARGOS'** APIs that have been configured by ARGOS Admins.

Note: More APIs can be configured by admins of ARGOS instances upon collaboration with the ARGOS technical team.



1. **Field Type** – *specifies the types of fields*
2. **External Reference Field** – *These fields load all APIs that have been configured from external resources such as Datasets, Funders and Grants.*
3. **Label** – *the name of the field*
4. **Placeholder** – *instructions in the field*
5. **Description** – *describes the field*
6. **Semantics** – *links your activity to other research outputs, activities and people*

2.3. Custom

There is the possibility to use other types of fields by using the *Custom* option.

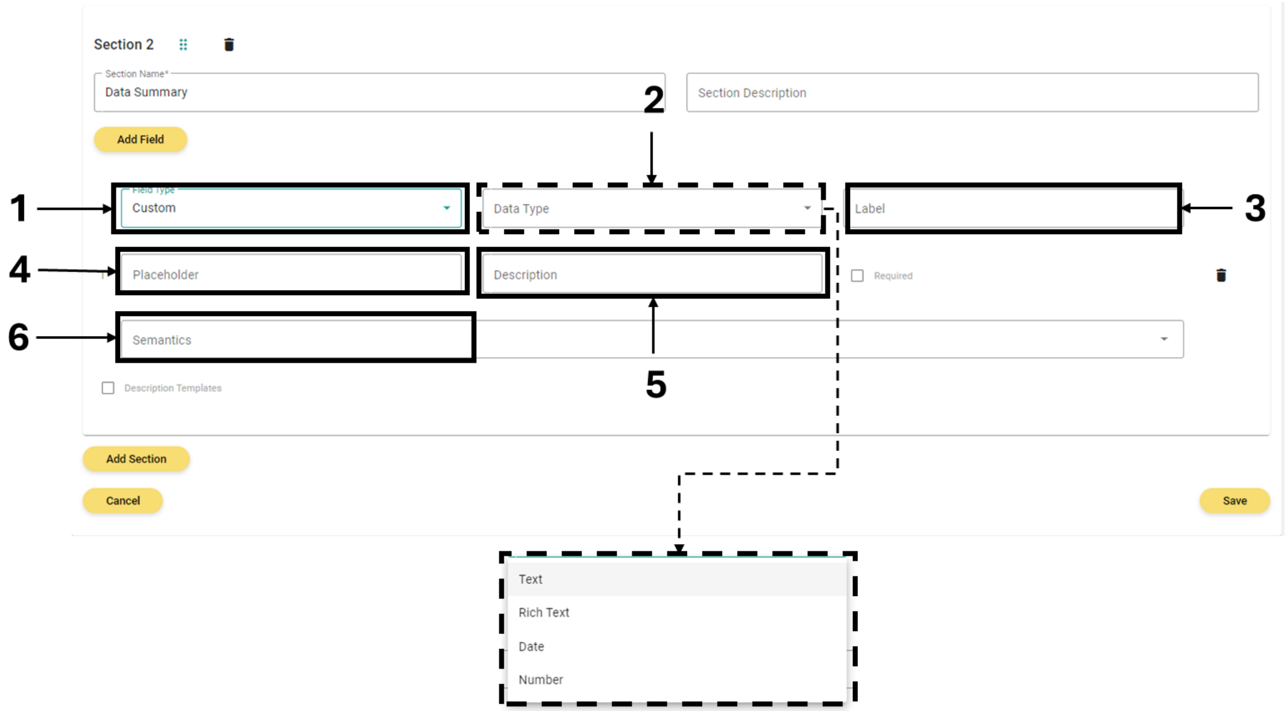


Figure 7. Custom fields

1. **Field Type** – *specifies the types of fields*
2. **Data Type** – contains *the custom fields which can be used as the Admin sees fit*
    a. **Text –** *a field for text*
    b. **Rich Text –** *a field for text with an editing toolbar*
    c. **Date –** *provides a calendar*
    d. **Number –** *recognises only numbers as input*
3. **Label** – *the name of the field*
4. **Placeholder** – *instructions in the field*
5. **Description** – *describes the field*
6. **Semantics** – *links your activity to other research outputs, activities and people*

3. Add Description Templates

Every Plan Blueprint should include at least one field that calls the content from a template. The template can be located in any section the administrator needs it. Also, within the same section, more than one Description Templates can be selected.

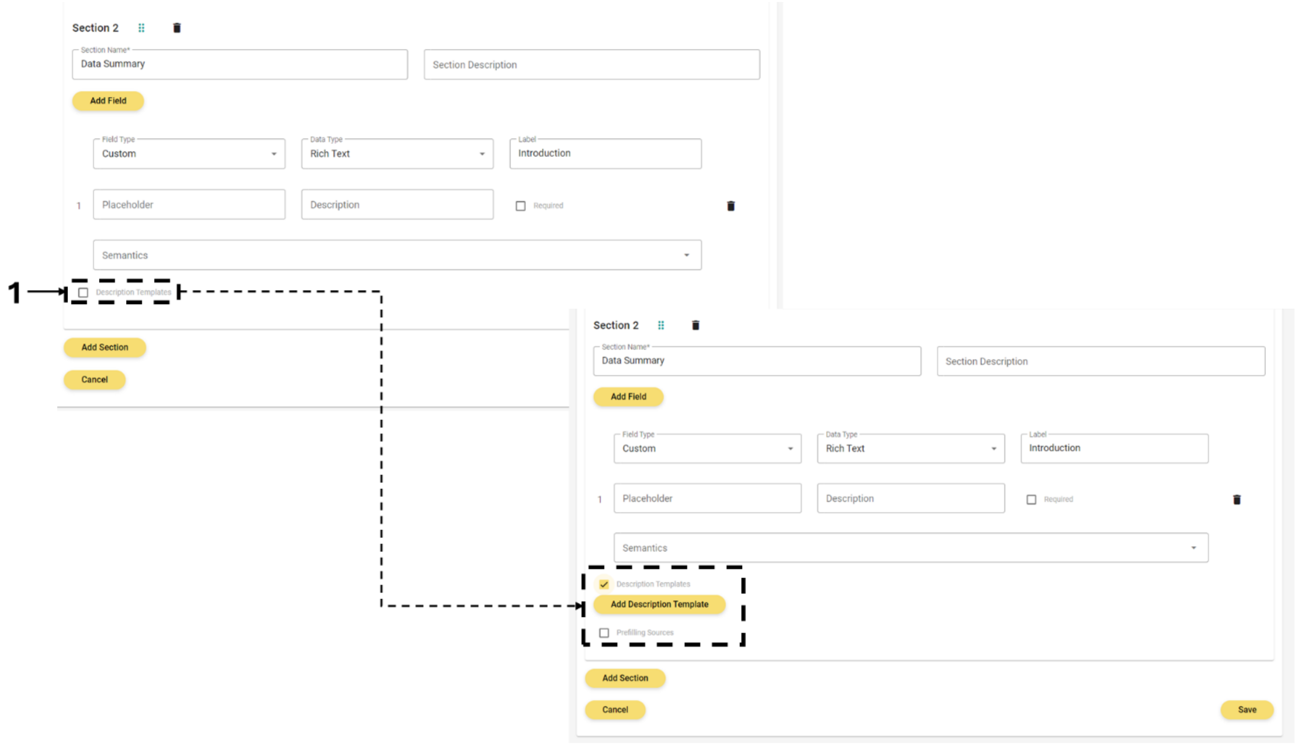


Figure 8. Workflow adding Description Template

1. **Description Templates checkbox** – *chooses if a Description Template will be available in the section*

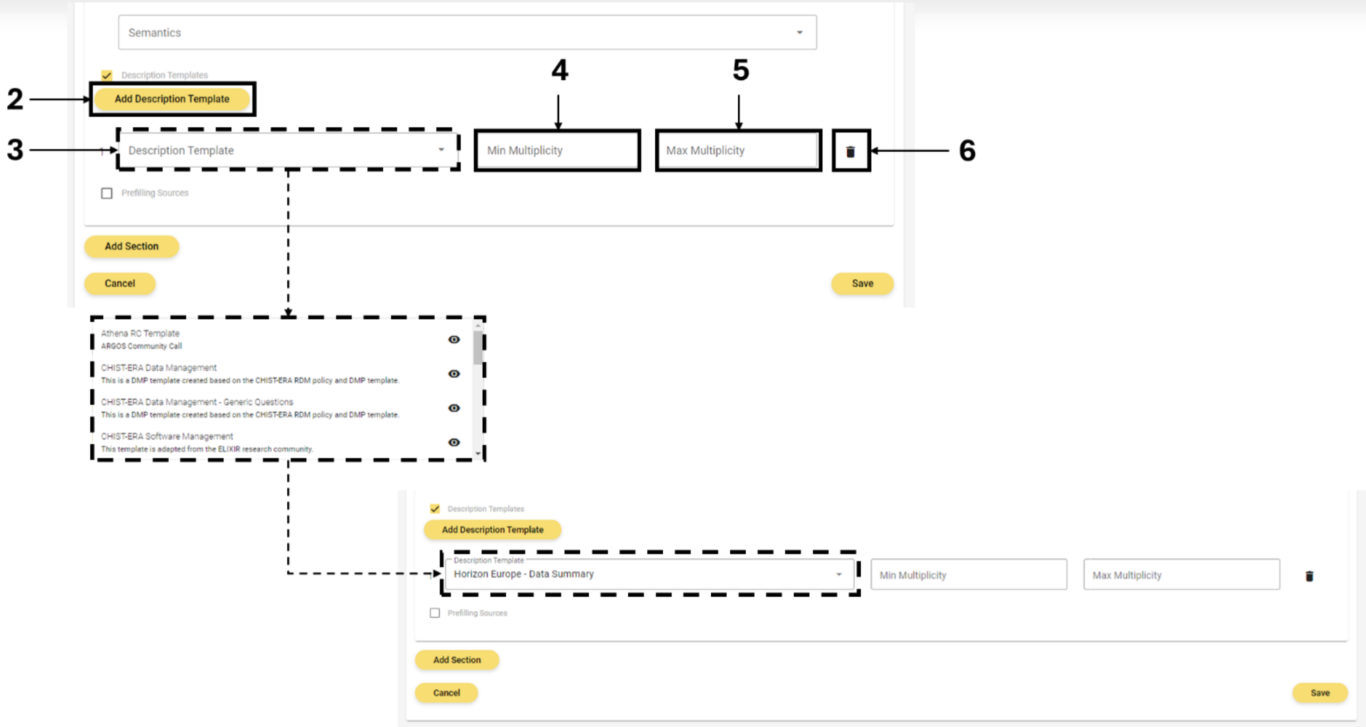


Figure 9. Workflow adding Description Template

2. **Add Description Template button** – *opens the field to add the template*
3. **Description Template** – *dropdown list with all finalised templates*
4. **Min Multiplicity** – *defines the minimum number of times that the template can be used in this section*
5. **Max Multiplicity** – *defines the maximum number of times that the template can be used in this section*
6. **Bin button** – *deletes the field*

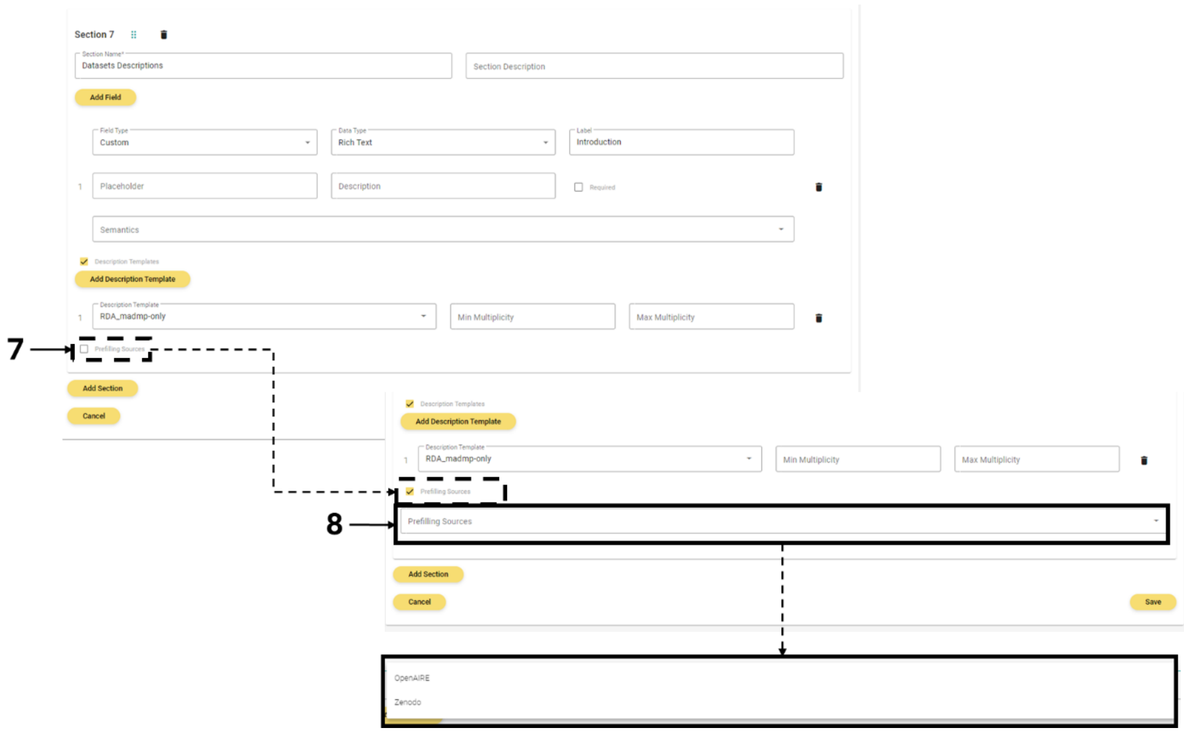


Figure 10. Workflow adding Description Template

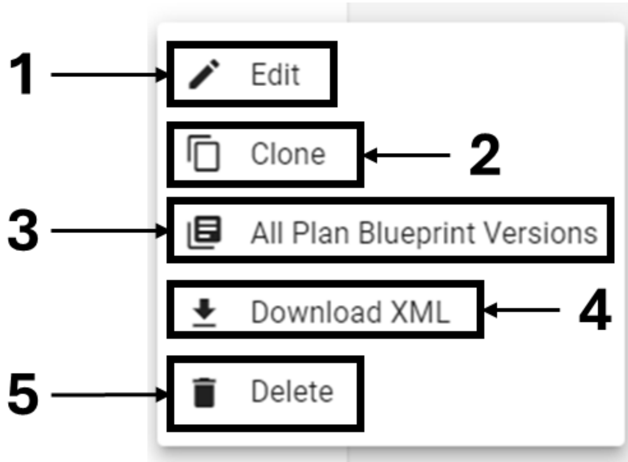
7. **Prefilling Sources button** – *selects if the template will be populated with content automatically from configured external sources*
8. **Prefilling Sources field** – *chooses the sources that can be used to prefill the template*

Note: Different sections can use different sources to prefill content.

Plan Blueprint's editing tools

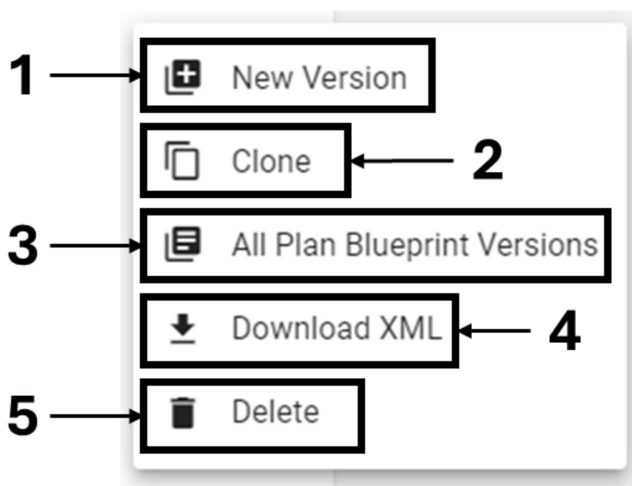
Some additional features are provided to edit the blueprints.

A. Draft Plan Blueprint



1. **Edit** - *edits the Plan Blueprint*
2. **Clone** - *creates a copy of the Plan Blueprint*
3. **All Plan Blueprint Versions** - *previews all the versions of the Plan Blueprint*
4. **Download XML** - *downloads the Plan Blueprint in xml format*
5. **Delete -** *erases the Plan Blueprint*

B. Finalised Plan Blueprint

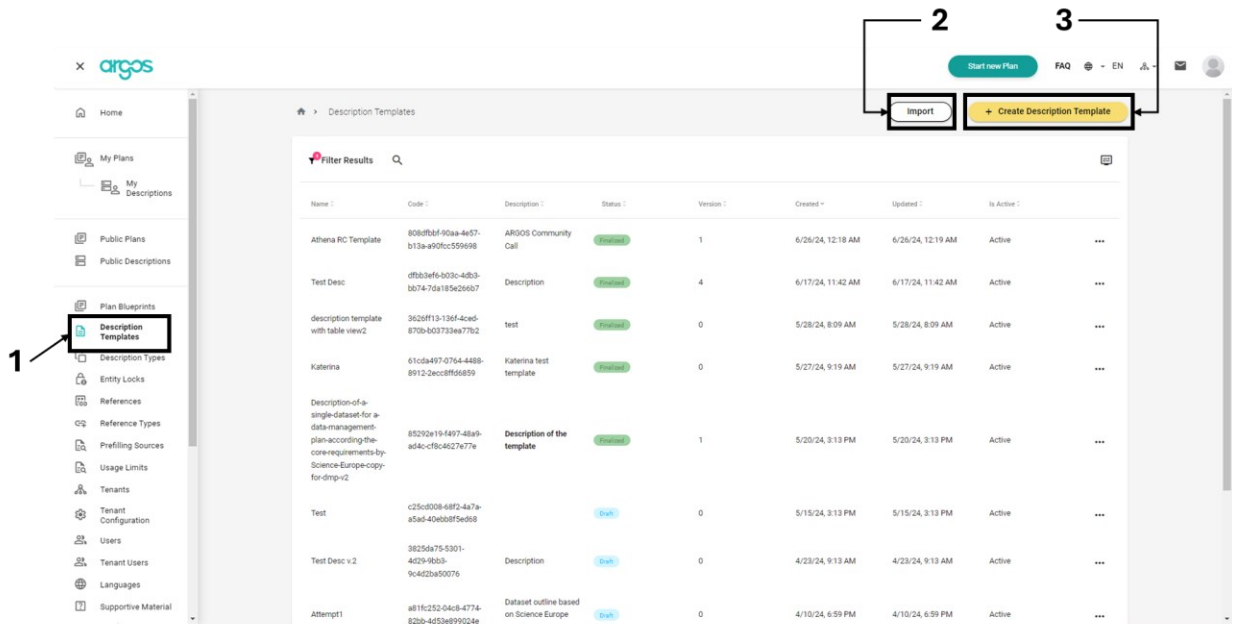


1. **New Version** - *creates a new version of the Plan Blueprint*
2. **Clone** - *creates a copy of the Plan Blueprint*
3. **All Description Template Versions** - *previews all the versions of the Plan Blueprint*
4. **Download XML** - *downloads the Plan Blueprint in xml format*
5. **Delete -** *erases the Plan Blueprint*

Description Template

All available Description Templates of **ARGOS** are included in its Description Template collection. To populate the collection with new templates, you can upload an existing file of the template or develop the template from scratch.

The following figure (1) is a snapshot of the screen:



1. Select *Description Template* from the menu on the left side of the screen
2. [Import]() or
3. [Create a Description Template]()

A. Import a Description Template

- ✓ **Click** the *[Import Button](#)*
- ✓ **Upload** the *File* of your Template (.xml)
- ✓ **Give a Name** to your *Description Template* and
- ✓ **Click** *Import* to finish the uploading process

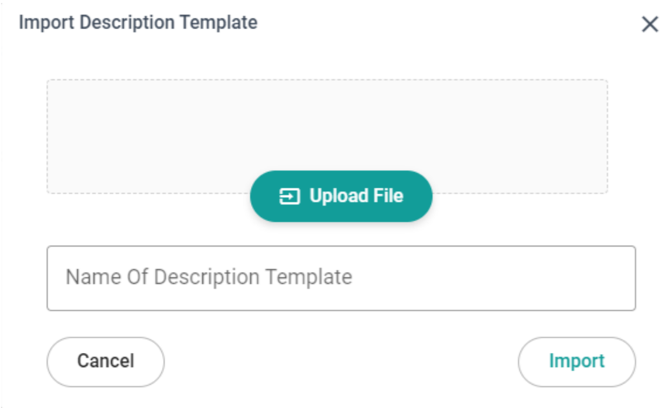
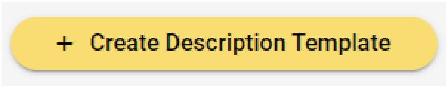


Figure 12. Import a Description Template

B. Create a Description Template

To create the Description Template from scratch, click the yellow button

Create Description template. 

Workflow

ARGOS Description Templates can be created in three simple steps:

The first step (*General Info*) contains basic information that **identifies** the Description Template: the *name* of the Description Template, its *Code*, its *Description*, its *Description Type*, the *language* in which the Description Template is created, and the *editors* of the Description Template.

The second step (*Form Description*) offers all the functionalities for the Description Template to be designed. It is the space to create the outline of the Template (Chapters, Sections, Sub-Sections, etc) and shape its content (add question(s), select question input(s)).

The third step (*Preview & Finalize*) is where the whole template can be viewed and validated before finalized.

Below, the three steps are explained with screenshots and examples.

Step 1: *General Info*

The first step to create a Description Template is *1. General Info*.

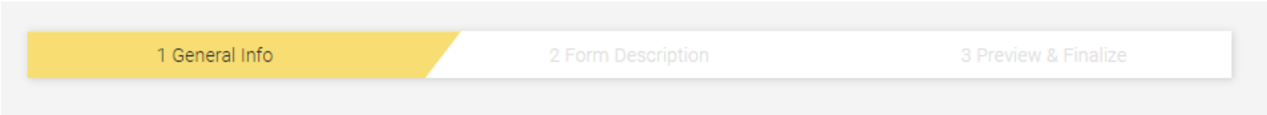


Figure 13. First Step

The initial screen contains mandatory questions that identify the Description Template. The following picture is a snapshot of the screen:

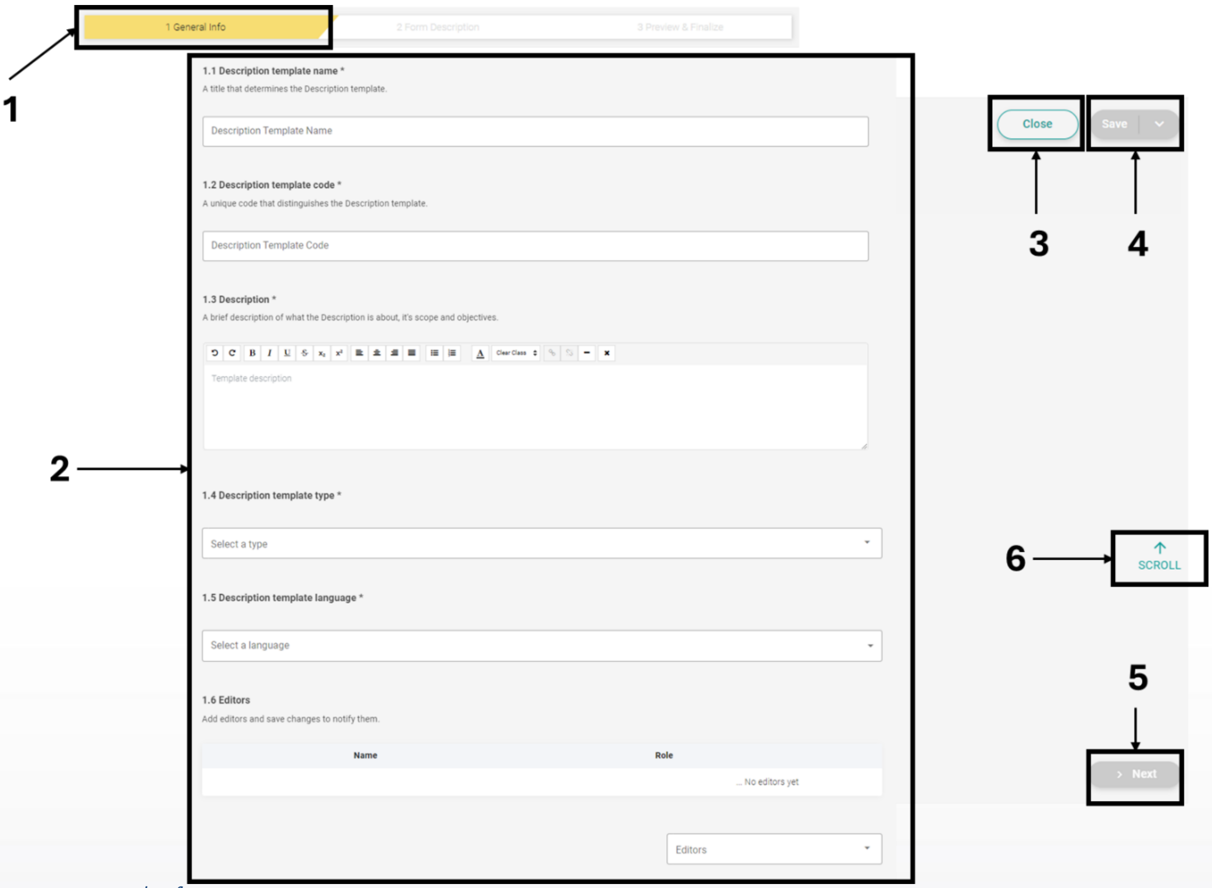


Figure 14. General Info

1. **General Info** – *you are in the first Step.*
2. **Editable Area** – *contains fields to be completed with basic information about the template.*
3. **Close** – *rejects the New Dataset Template.*
4. **Save** – *saves the General Information of the Description Template.*
5. **Next** – *moves to the [second step](#) (Form Description).*
6. ***Scroll*** – *moves to the top of the page.*

***Note:** Not all the fields are mandatory. The mandatory fields appear with an asterisk (*).

1.1 Description template name *

Give a title that determines the Description template.

Figure 15. Description template name

1.2 Code *

Give a unique user defined field.

Figure 16. Code of template

1.3 Description *

Briefly describe what the Description Template is about, it's scope and objectives.

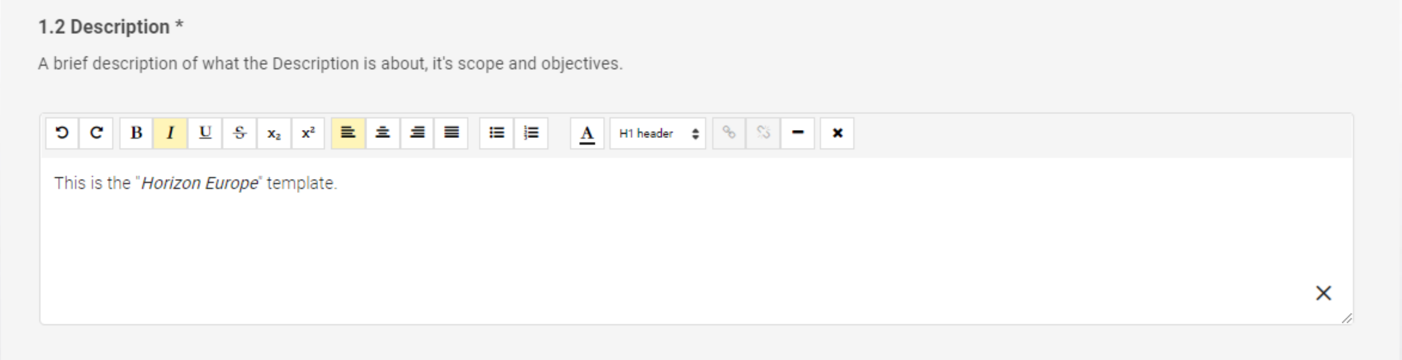


Figure 6. Description

1.4 Description template type *

Define the type of your Description Template

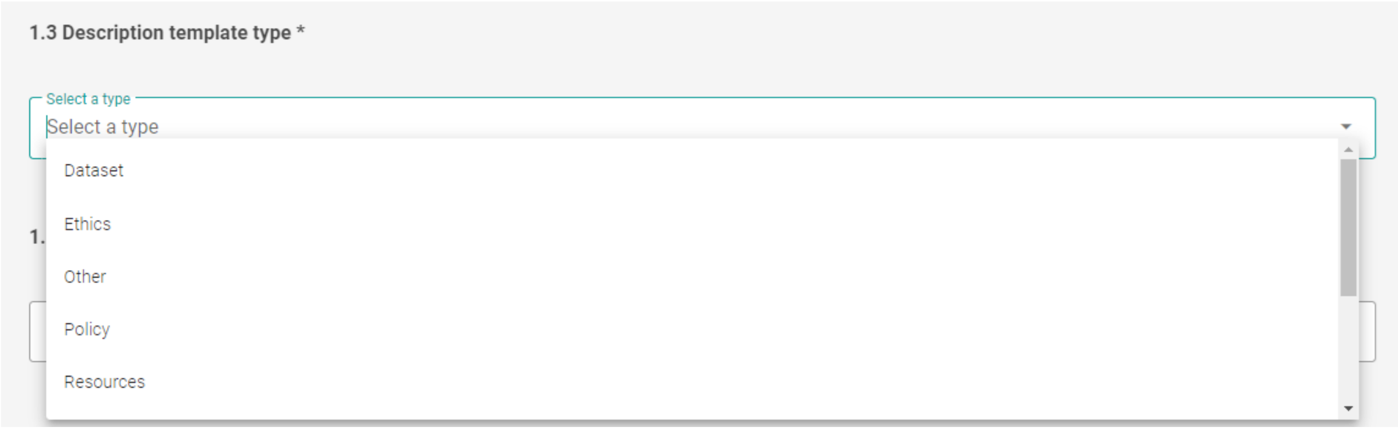


Figure 7. Description template type

1.5 Description template language *

Define the language for your Description Template

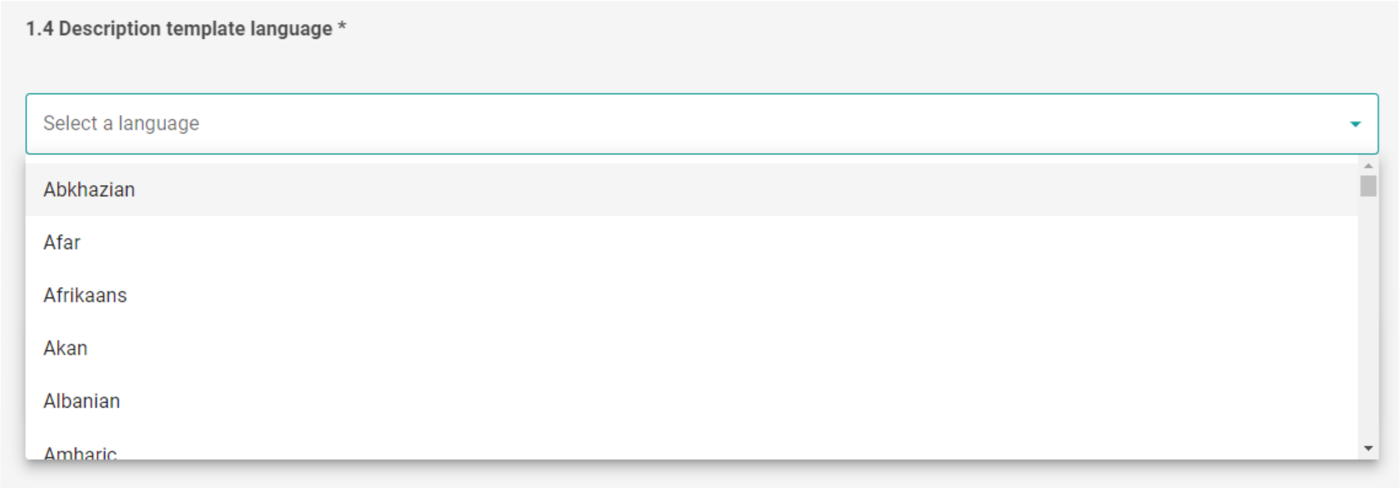


Figure 8. Description template language

1.6 Editors

Invite your colleagues and co-create the Description Template. Control the rights that co-creators have on your Description Templates.

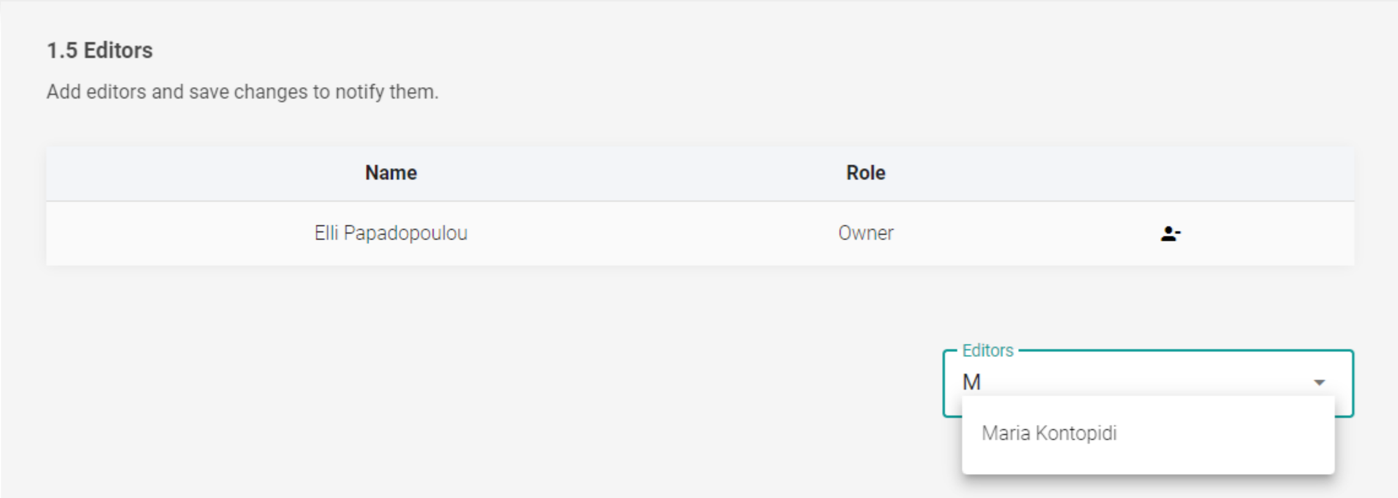


Figure 9. Editors

Step 2: *Form Description*

The second step to create a Description Template is *2. Form Description*.

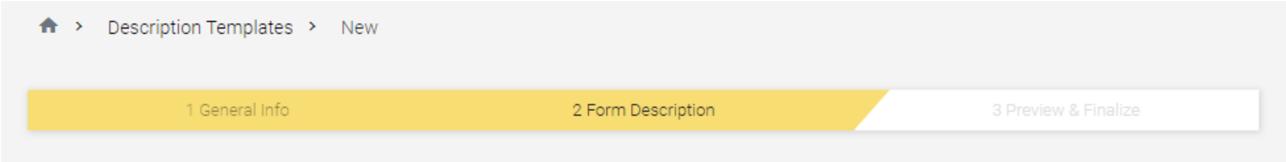


Figure 10. Second Step

Form Description is the main step in the creation of a new Description Template. It contains tools that assist with the template's Outline and Content. The Description Template is structured in Chapters and Sections which are populated with questions. Chapters and Sections must be given a name and a description.

The image below is a snapshot of the screen for the outline of the Description Template:

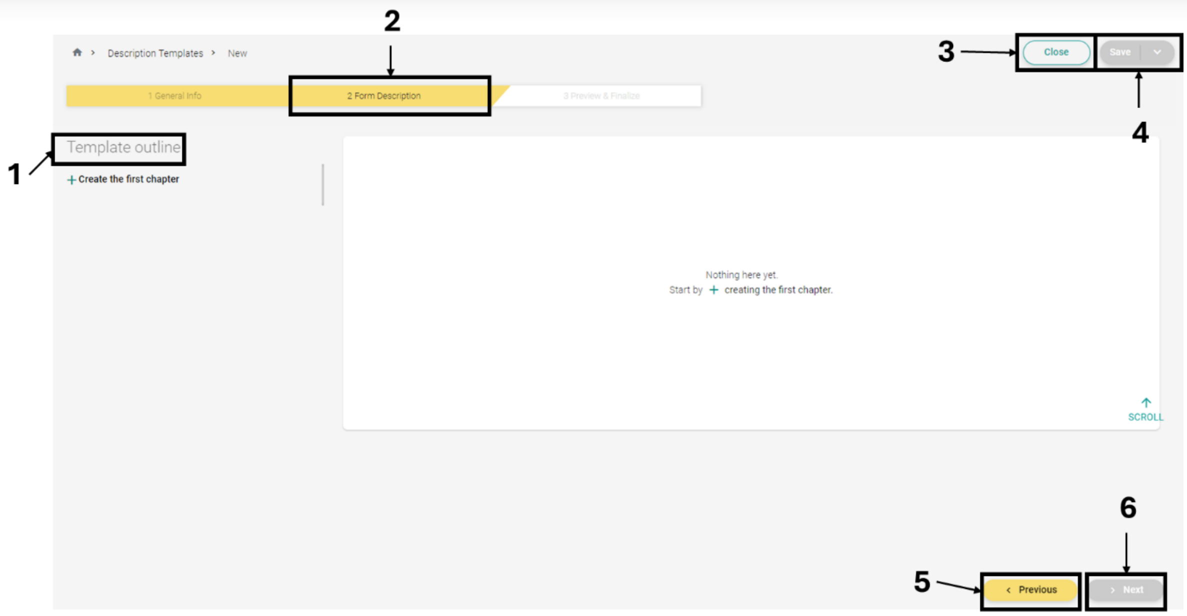


Figure 11. Form Description

1. **Form Description** – *You are in the second Step.*
2. **Template Outline Area** – *the area to start creating the Template.*
3. **Close** – *rejects the New Description Template.*
4. **Save** – *loads data or files from the persistent storage into main memory.*
5. **Previous** – *navigates back to step 1. General Info.*
6. **Next** – *moves to step 3. Preview & Finalize*.

2.1 Create chapter(s)

A Chapter is the higher division of the Description Template. Each chapter has a title and description and is followed by Sections.

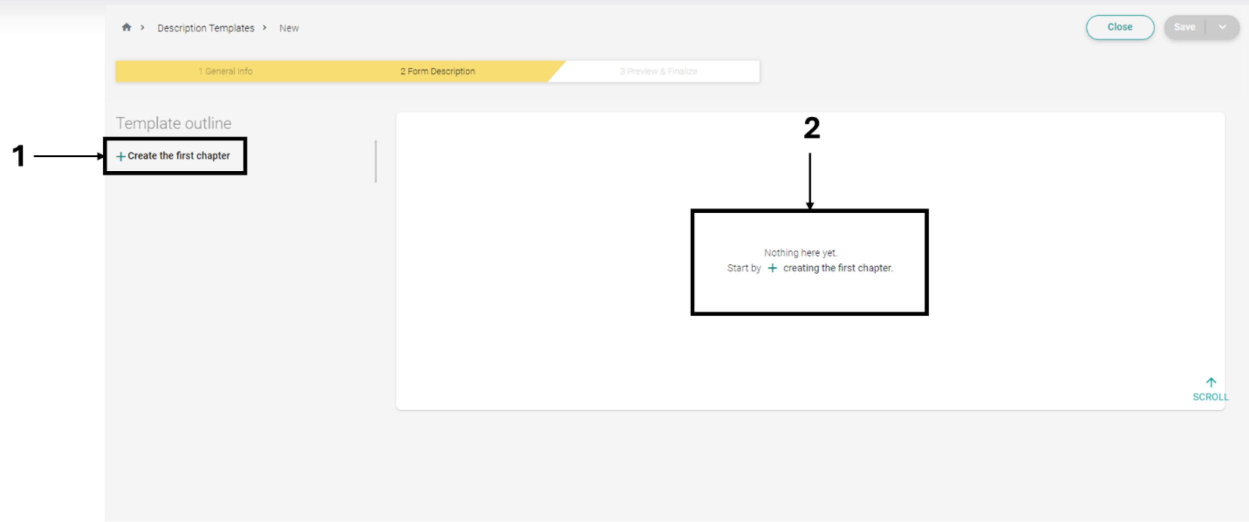


Figure 12. Create the first Chapter

You can create Chapters from the template outline area in the left side or in the center of the screen.

2.1.1 Chapter Name*

Set a name for the description chapter.

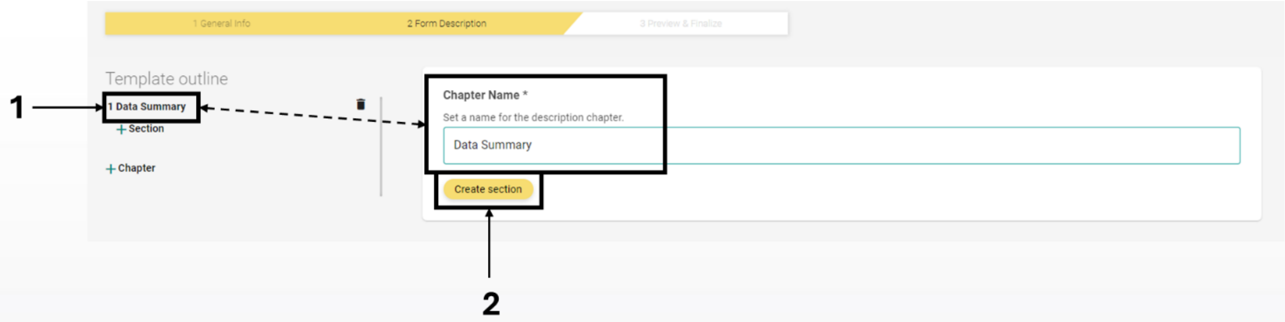


Figure 13. Data Summary

1. **Chapter name** – *give a title that determines the Description Chapter.*

   The name of your chapter appears automatically on the Template Outline (left side of the screen).

2. **Create Section** – *creates a sub-division within the main division of the Description Template.*

2.2 Create Section(s)

A Section can be one or more sub-divisions of a Chapter in the Description Template. Each Section has questions and is identified with a name and a description.

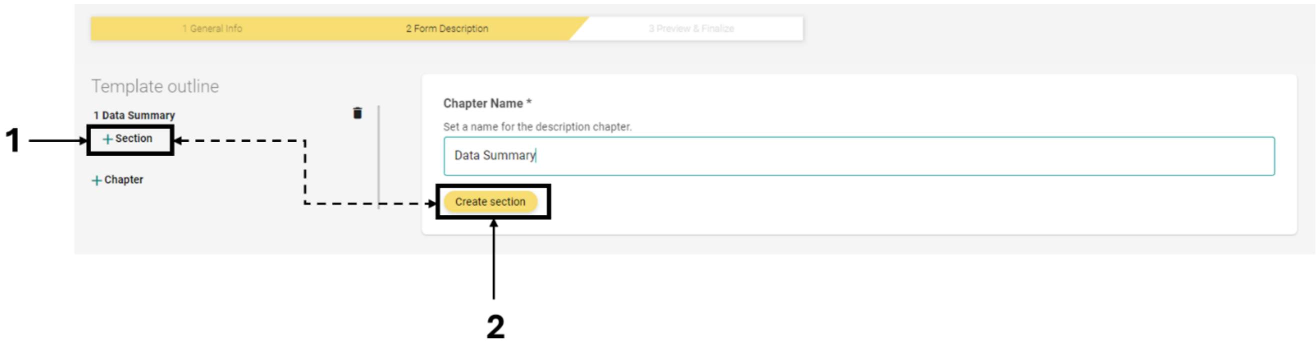


Figure 14. Create Section

You can create Section(s) from the template outline area in the left side or in the center of the screen.

2.2.2 Section Name*

Set a name for the section.

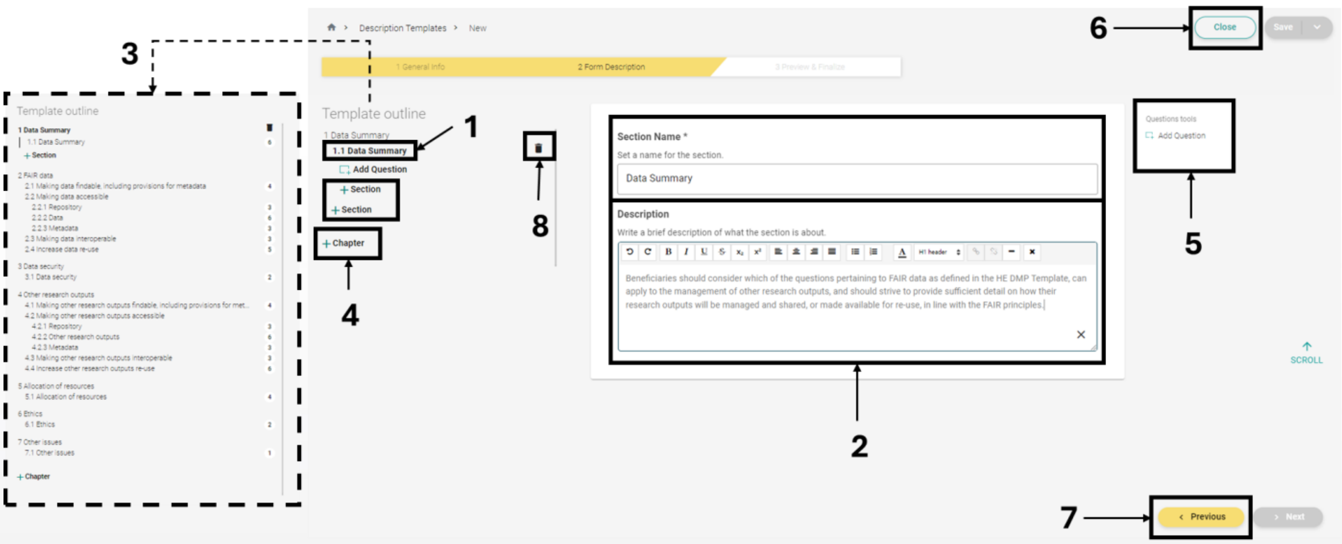


Figure 15. Section Name

1. **Section name** – *sets a name for the Section.*

The name of your section(s) appears automatically on the Template Outline (left side of the screen).

2. **Description** – *provides a summary of the scope and objectives of the section.*
3. **Section** – *adds more than one Section(s) and sub-sections (sections within Sections)*
4. **Chapter** – *adds Chapters*
5. **Question Toolbox** – *contains a set of actions for the created questions*.
6. **Close** – *rejects the New Dataset Template.*
7. **Previous** – *moves back to [step.](#)*
8. **Delete** – *permanently removes the selected Section(s).*

2.3 Add Question(s)

Add one or more questions in the Description Template under your Sections (sub– sections etc).

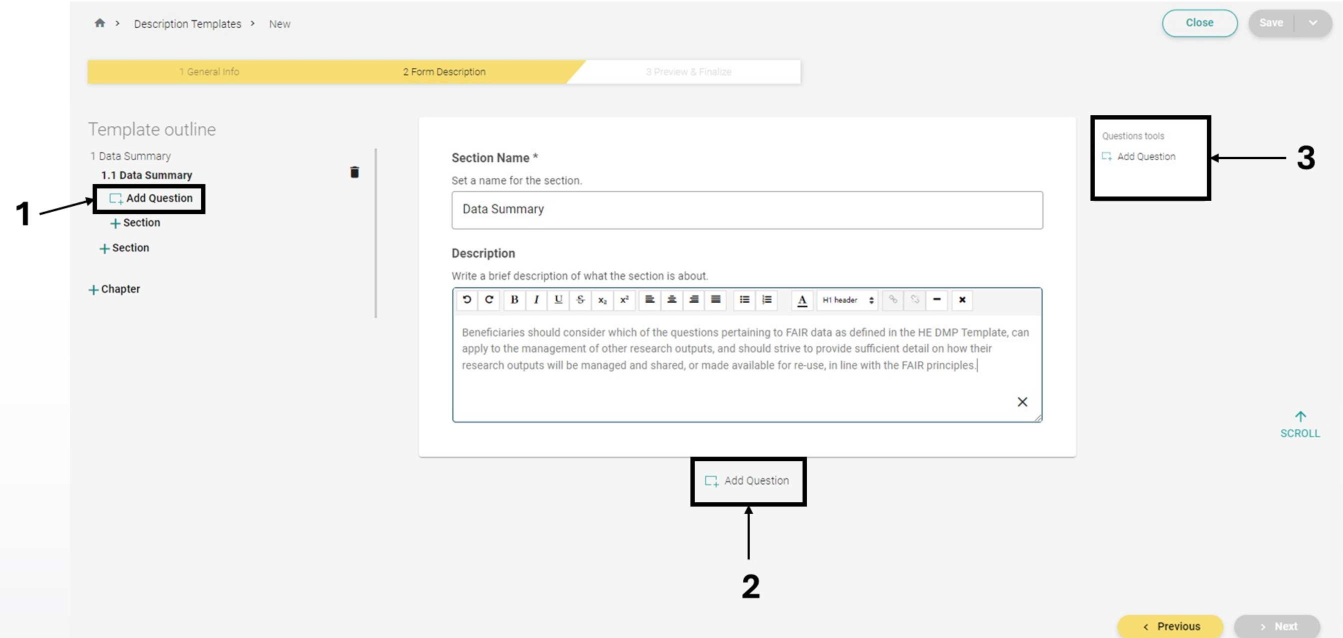


Figure 16. Add a new Question

You can add question(s) by selecting *add question* from:

1. the Template Outline (left side of the screen),
2. the button below the Section panel (when hovering over the center of the screen),
3. the Question tool box (right side of the screen).

***Note:** Actions 1 & 3 execute the same activity: when selected, new question(s) are added after the last question of the section; However, action 2 allows for new question(s) to be added in an ordered manner, on a specific part of the section, e.g. after question 3.

When creating a question, there are couple of new fields that should be filled:

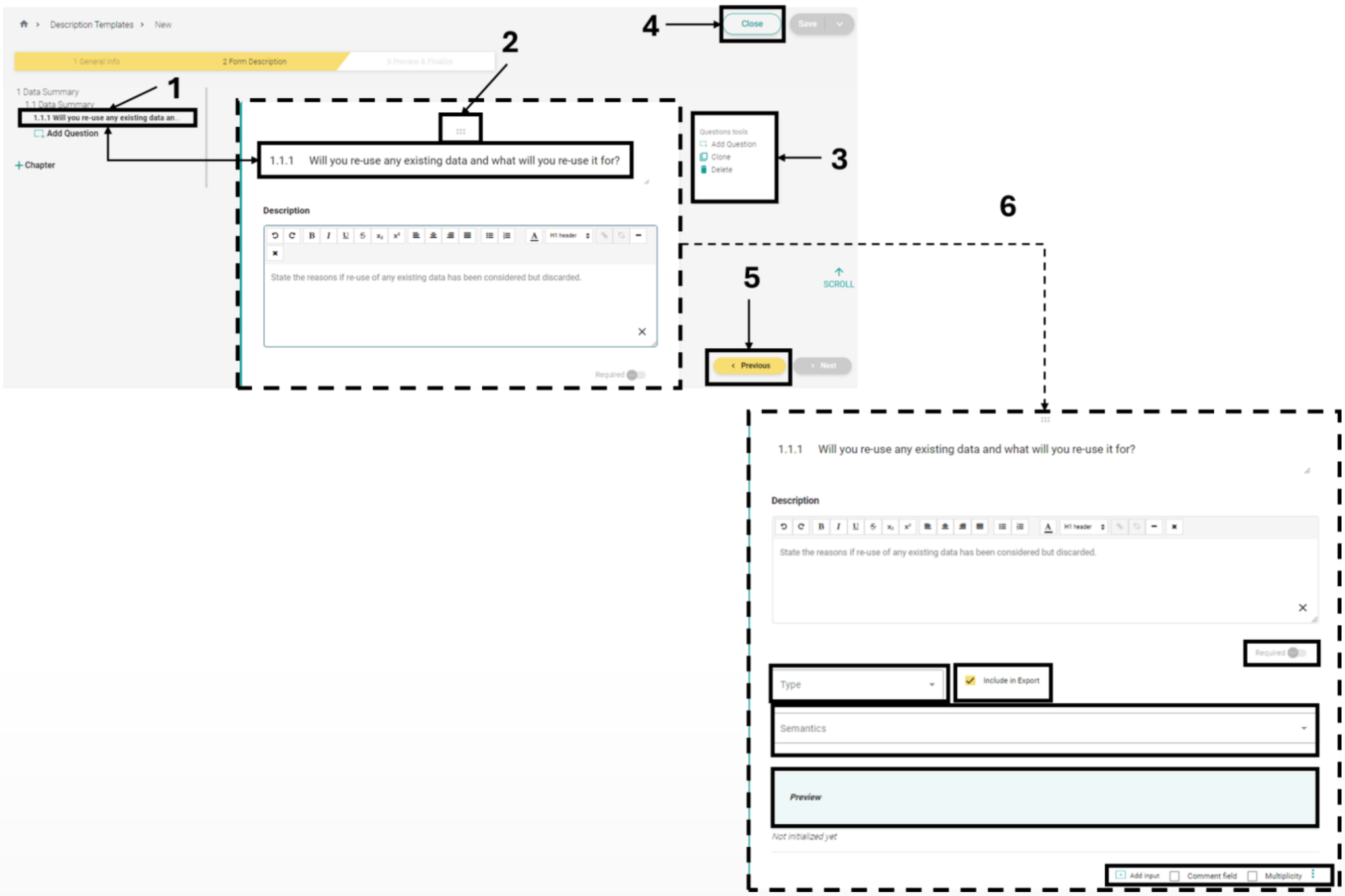


Figure 17. Add question area

1. **Add question** – *write the name of the question. The name of your question appears automatically on the Template Outline (left side of the screen).*
2. **Dots** – *hover over the icon with the dots on top of the editing area of the question, drag and drop the question up and down to change its order.*

3. **Question Tool box** – *the Question Tools box lets you proceed with the following actions:*
   - **Add a question** – *opens a new, blank question*
   - **Clone the question** – *copies and re-generates an existing question with all its added properties.*
   - **Delete the question** – *permanently removes the question from the Description Template.*
4. **Back**– *rejects the New Description Template.*
5. **Previous** – *moves back to [Step 1. General Info.](#)*
6. **Question Editable Area** – *the Area where the question is shaped.*

2.3.1 Required

Define if the question is mandatory and, thus, should be always completed.

Required questions do not allow the users to finalize their Plans without answering them.

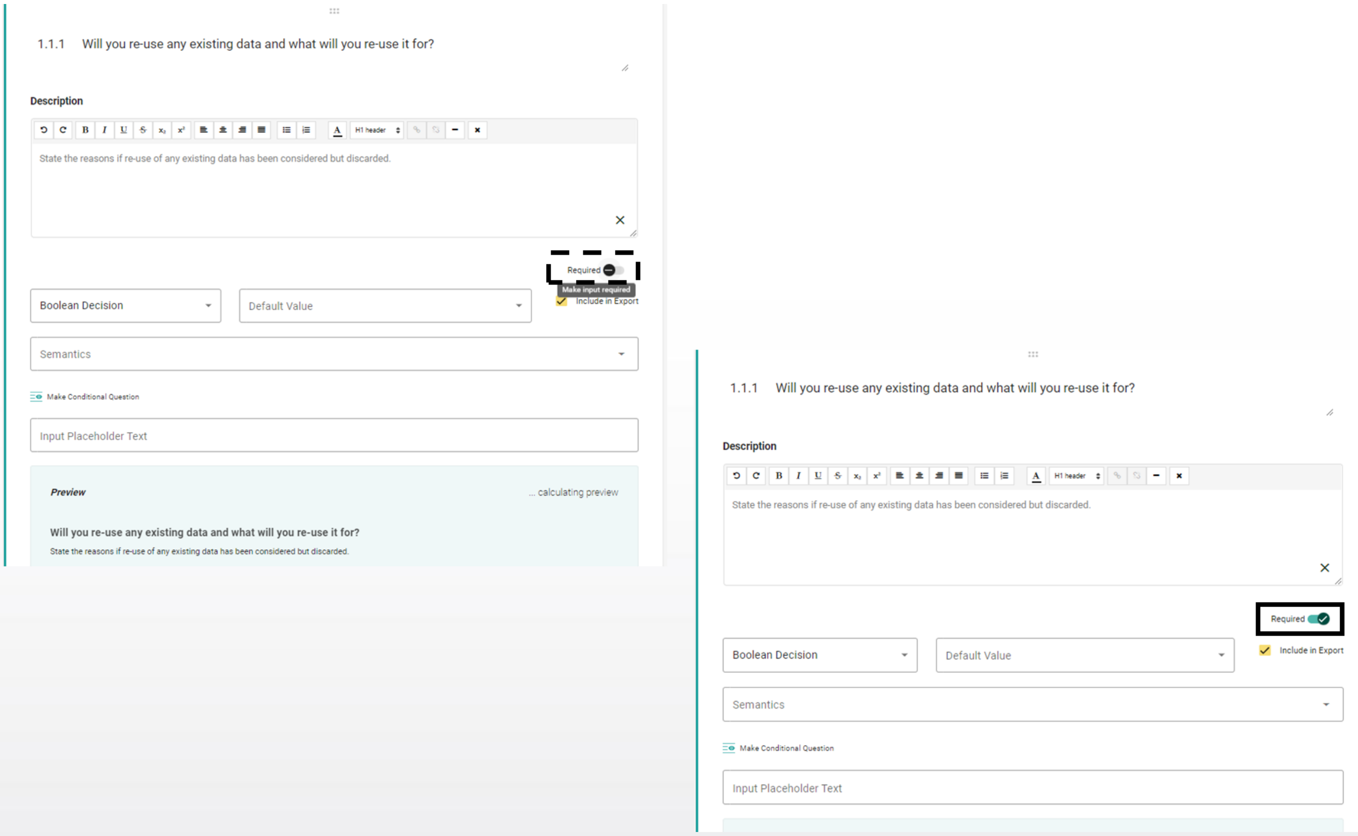


Figure 18. Required

2.3.2. Preview

A preview of the question is automatically created as the question is formulated and is available in the light green box of the Question Editable Area.

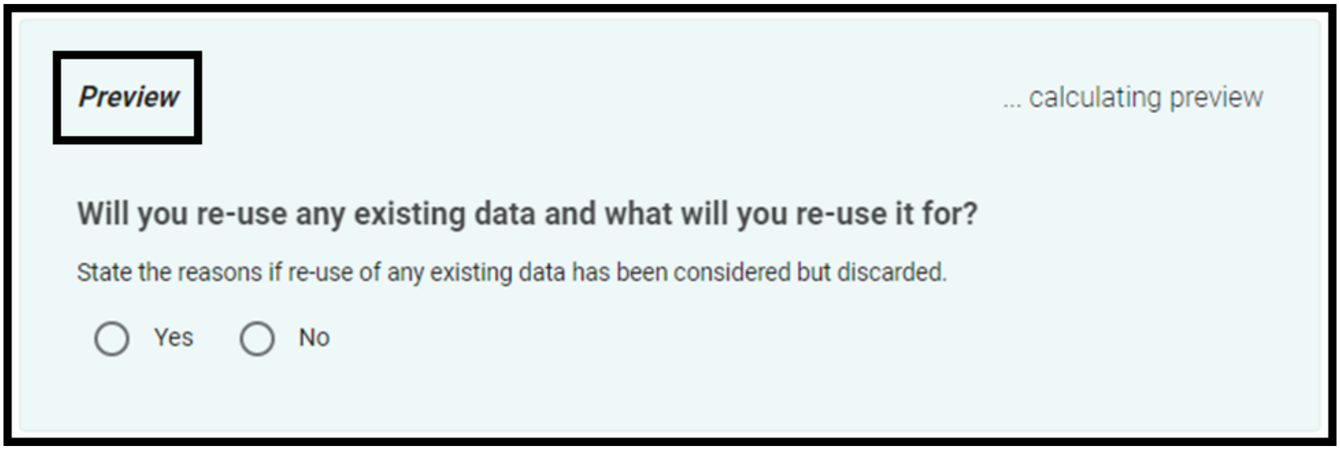


Figure 19. Preview area

2.3.3 Input Type

The questions are categorized in two major types: open-ended questions and close-ended questions. Other Types of questions are APIs that retrieve data from external authoritative resources and internal **ARGOS** Entities (These are internal entities that are handled by the Super Admins).

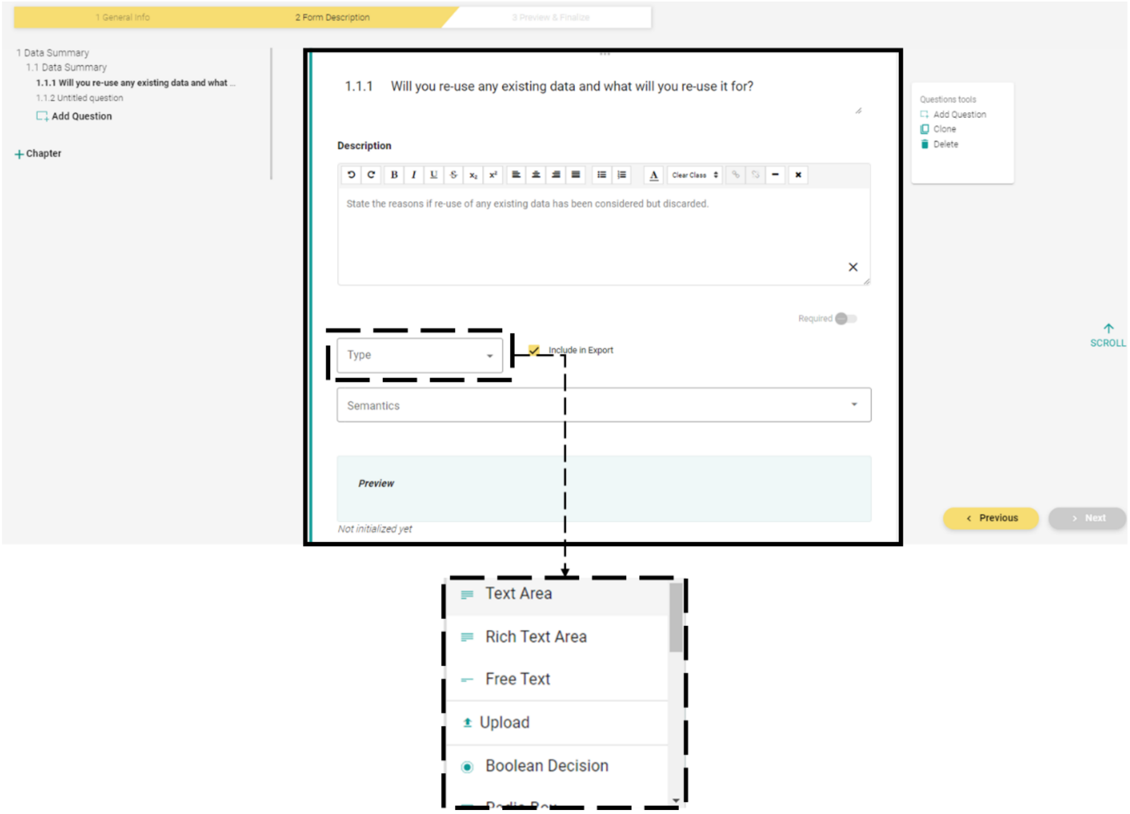


Figure 20. Input Type

Open-ended questions:

- **Text Area**

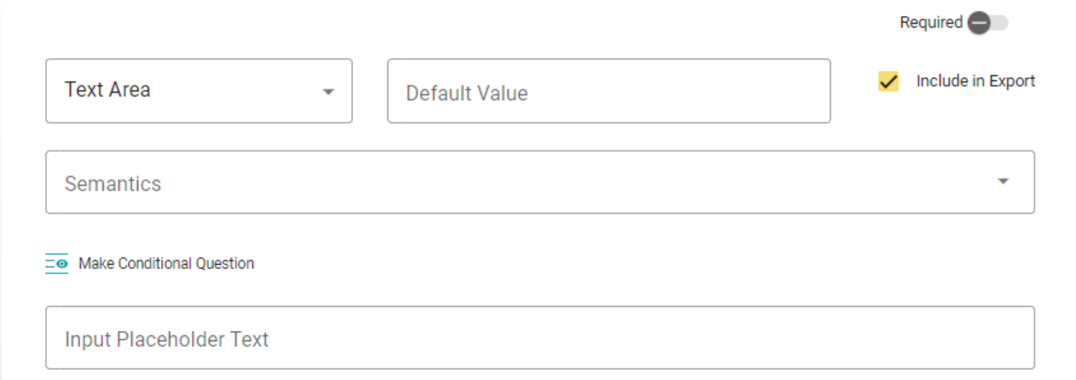


Figure 21. Text Area

- **Rich Text Area**

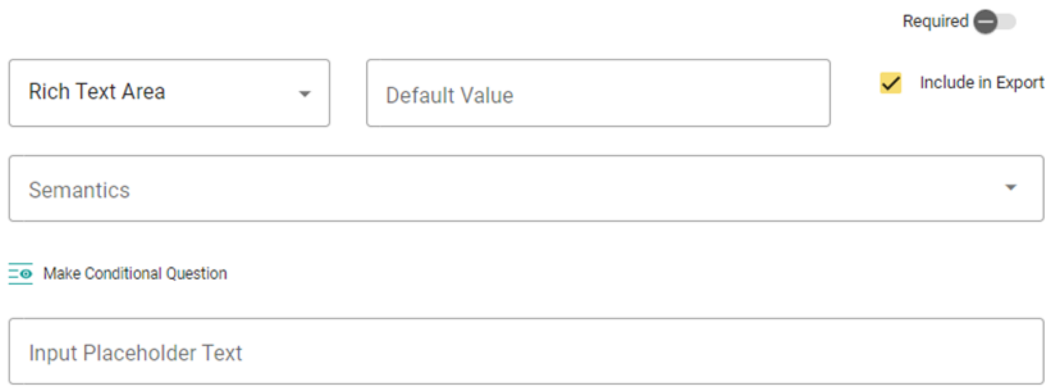


Figure 22. Rich Text Area

- **Free Text Area**

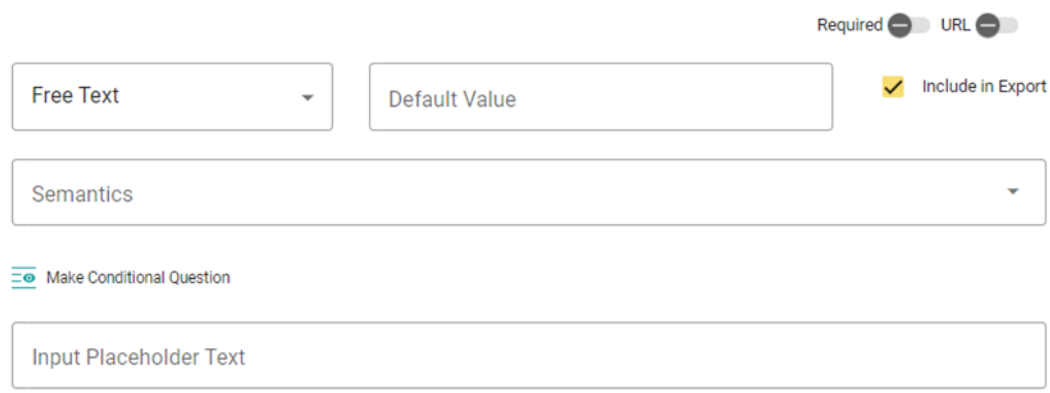


Figure 23. Free Text Area

They define a multi-line text input control where information is represented in an ordinary language without any constraint of format, to numerical, coded, or structured data.

The "Free Text Area" has a "URL" button which validates if the input is a link.

Close-ended questions:

- **Upload** – *An Upload is an object that allows the user to upload files in pre-selected formats.*

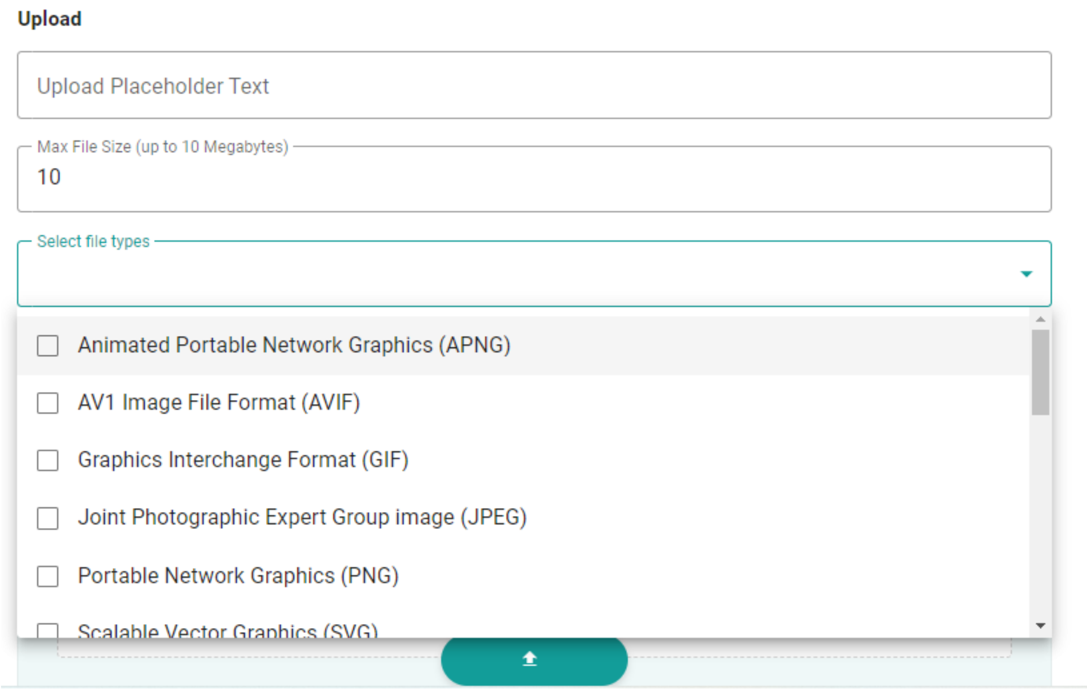


Figure 22. Upload

- **Boolean Decision** – *A Boolean Decision is an object that is given the values* ***Yes*** *or* ***No***

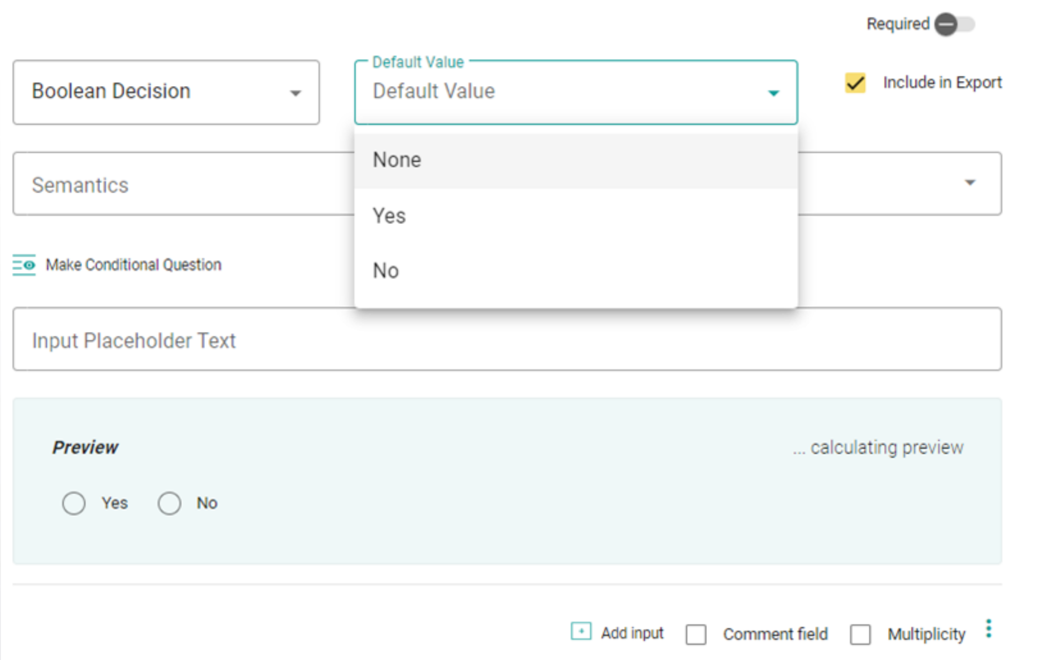


Figure 22. Boolean Decision

- **Radio Box** – *A radio box is a graphical control element that allows the user to choose only one of a predefined set of mutually exclusive options.*

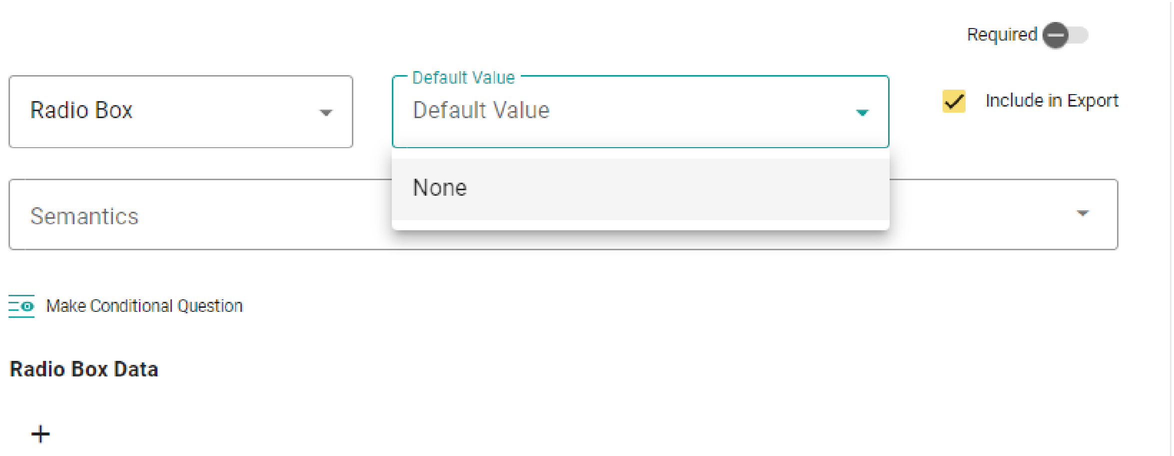


Figure 23. Radio Box

- **Select** – *The Select element defines a drop-down list, each element is normally accompanied by a Label and its Value describing the choice that the Select list represents. Select questions can be single or multiple choice.*

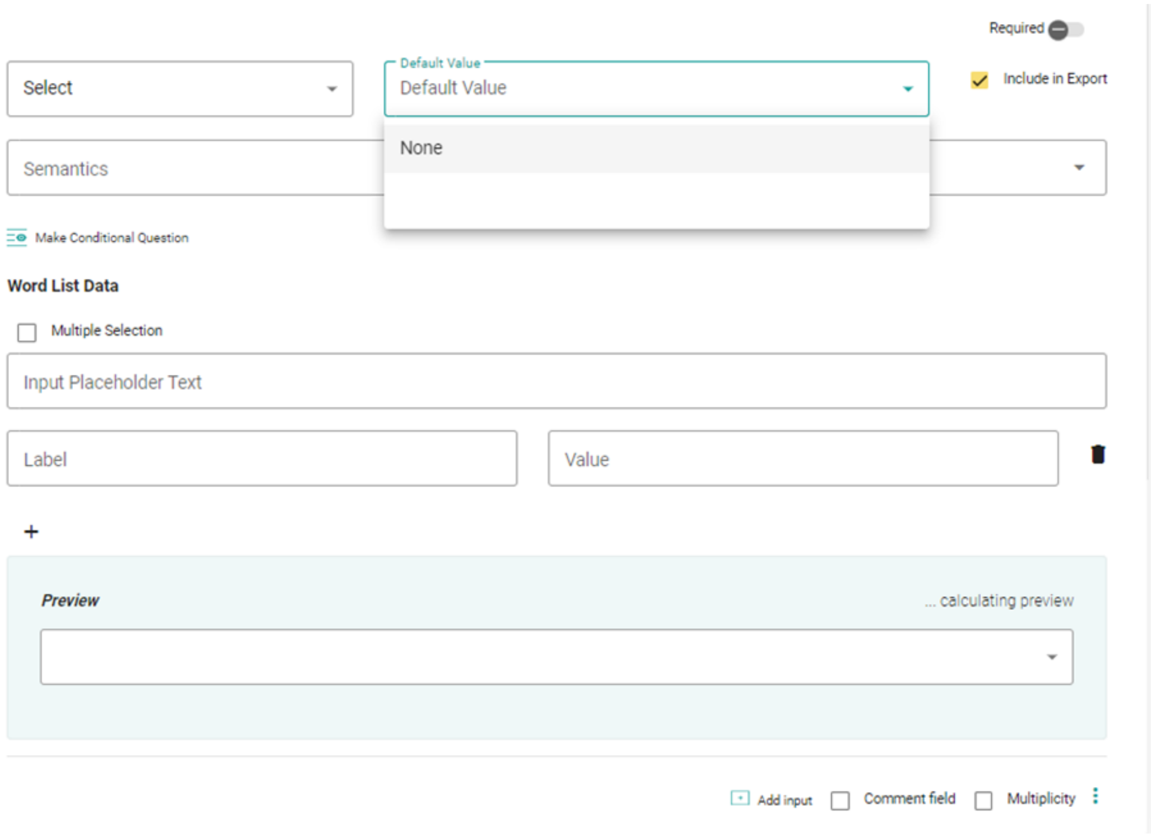


Figure 24. Select

- **Checkbox** – *A checkbox is a small interactive box that can be toggled by the user to indicate an affirmative or negative choice.*

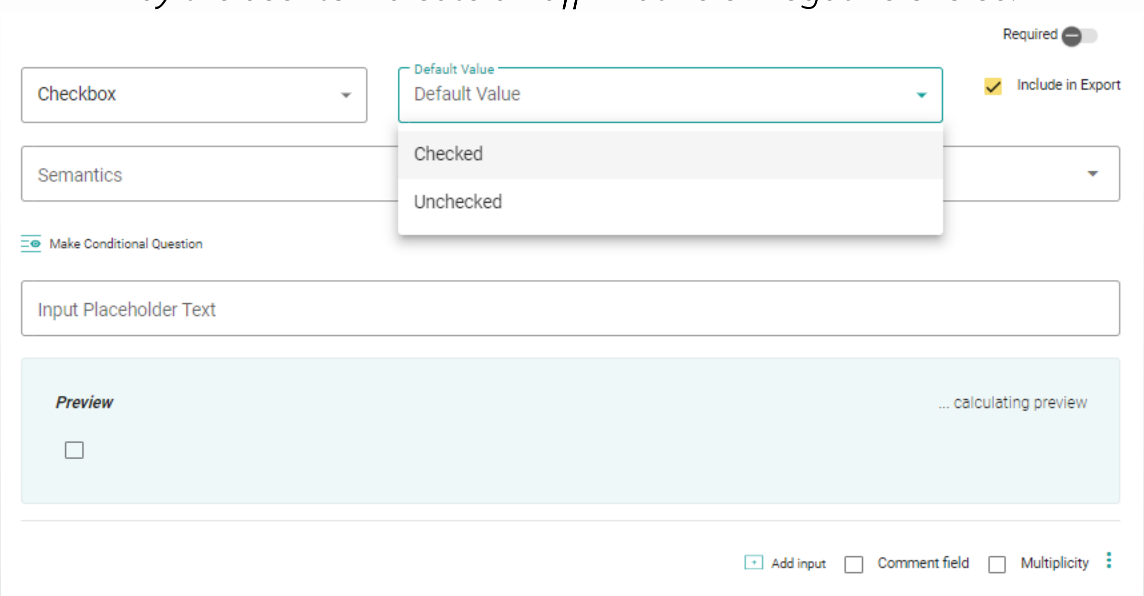


Figure 25. Checked Box

- **Date Picker** – *Date Picker allows the user to select a date from a calendar.*

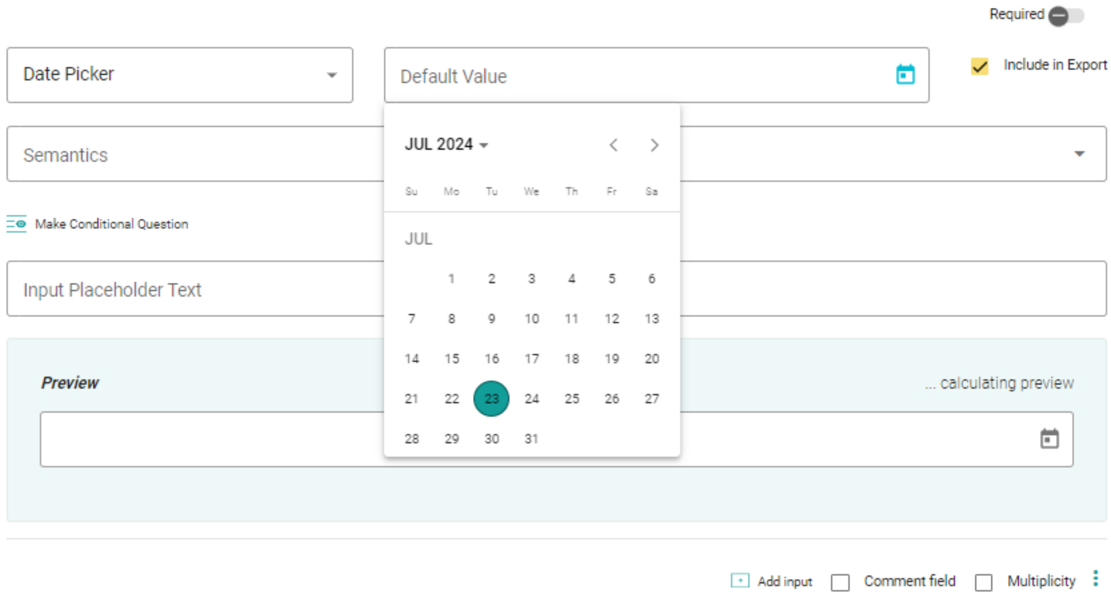


Figure 26. Date picker

- **APIS** – *API stands for 'Application Programming Interface'. APIs are software intermediaries that allow* **ARGOS** *to communicate with external authoritative resources. The external resources provided in the group "Reference Type". Define to the users to select one or more external resources (Multiple Select). The external resources that* **ARGOS** *provides are the following:*
    - **Currencies** – a complete list of currency coming from the Static
    - **Datasets** – a list of datasets harvested by OpenAIRE content providers
    - **File Formats** – a complete list of file formats coming straight from the Static
    - **Funders** – a complete list of funders coming straight from the OpenAIRE Graph
    - **Grants** – a complete list of grants coming straight from the OpenAIRE Graph
    - **Journals** – a complete list of journals coming straight from the OpenAIRE Graph
    - **Licenses** – a complete list of licenses coming straight from the Open Definition

- **Metadata Services** – a complete list of metadata standards coming straight from the Static
- **Organisations** – a complete, deduplicated list of organisations coming straight from OpenAIRE Graph (combines ROR, GRID, Crossref, etc)
- **Projects** – a complete list of projects coming straight from the Static
- **Publication Repositories** – a complete list of publication repositories coming straight from the OpenAIRE Graph
- **Publications –** a complete list of publications coming straight from the OpenAIRE Graph
- **Registries -** a complete list of registries coming straight from the RDA Metadata Schemes
- **Repositories** – a list of data repositories coming straight from OpenAIRE (combines re3data, PROVIDE etc)
- **Researchers** – a list of researcher names and their persistent identifier coming straight from ORCID
- **Services** – a complete list of EOSC resources coming straight from the EOSC Marketplace
- **Taxonomies -** a list of taxonomies coming straight from the Static

- **ARGOS Entities (These are internal entities that are handled by the Super Admins)**
    - **Internal Plans** – a list of re-usable internal **ARGOS** entities
    - **Internal Descriptions**
    - **Tags** – a free text registry that stores keywords to ease DMPs searchability
    - **Dataset Identifier** – a pre-defined list of PID systems
    - **Validator** – a field that validates the input against the selected source

2.3.4 Semantics

ARGOS adopted the RDA DMP Common Standard and semantics from Zenodo to align its practices with the global research data community and to achieve interoperability of Plans.

You can map the DMP entities and properties from the list to your questions to fit your own, unique Template needs.

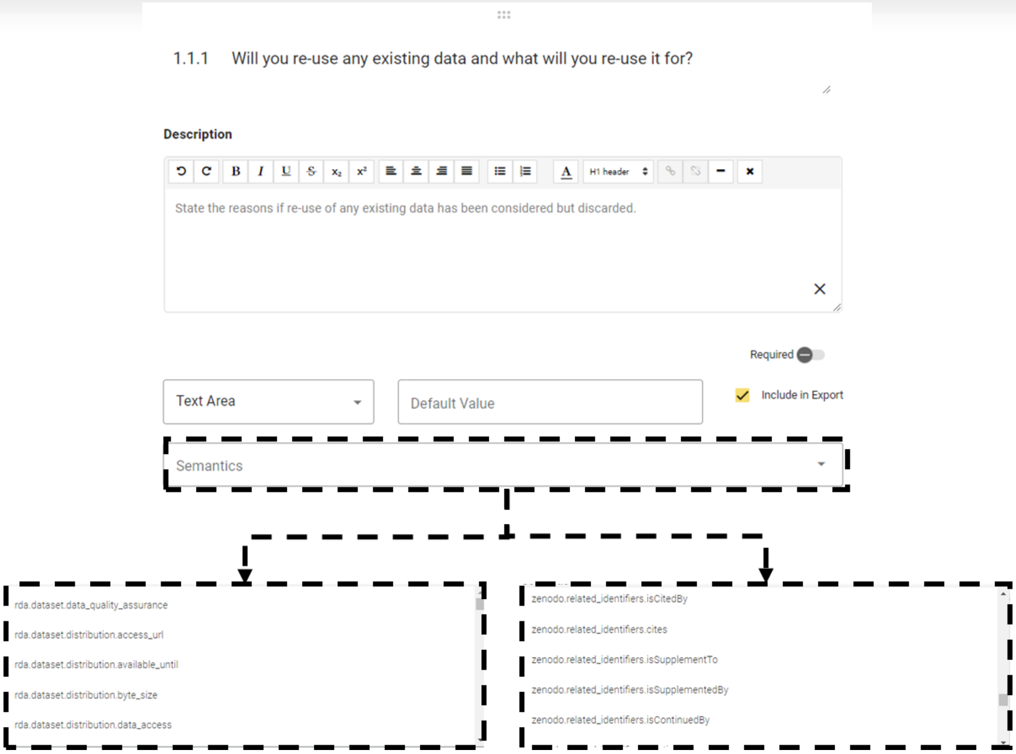


Figure 28. RDA Common Standards and Zenodo semantics

2.3.5 Default Value

Display an answer that has been pre-selected/ pre-defined for the question. The pre-selected answer can be changed at any time by the users.

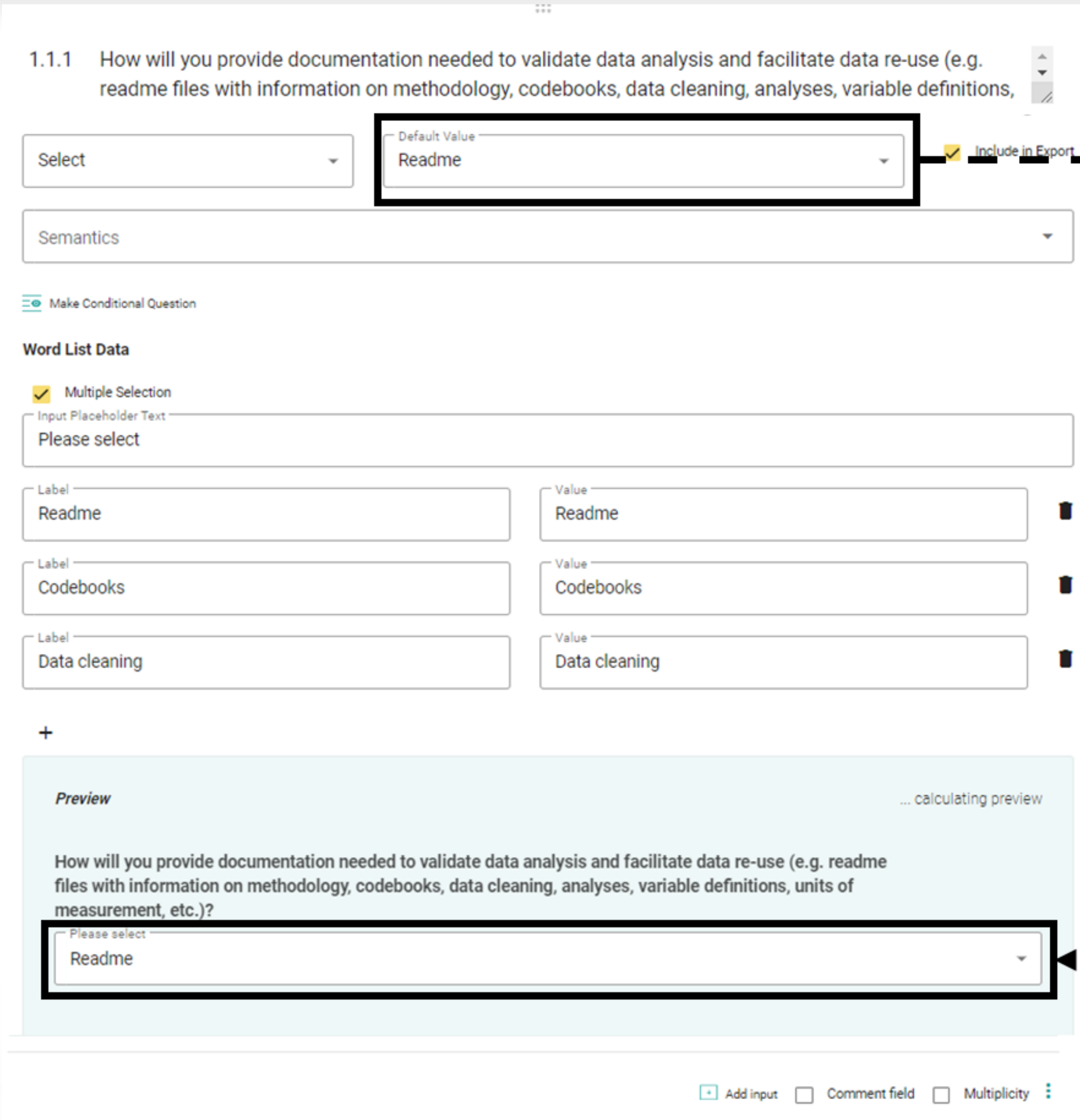


Figure 29. Default Value

2.3.6 Add Input

Add more than one input(s) to your question. Mix and match different types of inputs to create unique questions that offer users with multiple ways and guidance on how to answer the question.

Hover over the option *Add Input* and select the extra type of input to be added to the question. Add Input can be used infinite times.

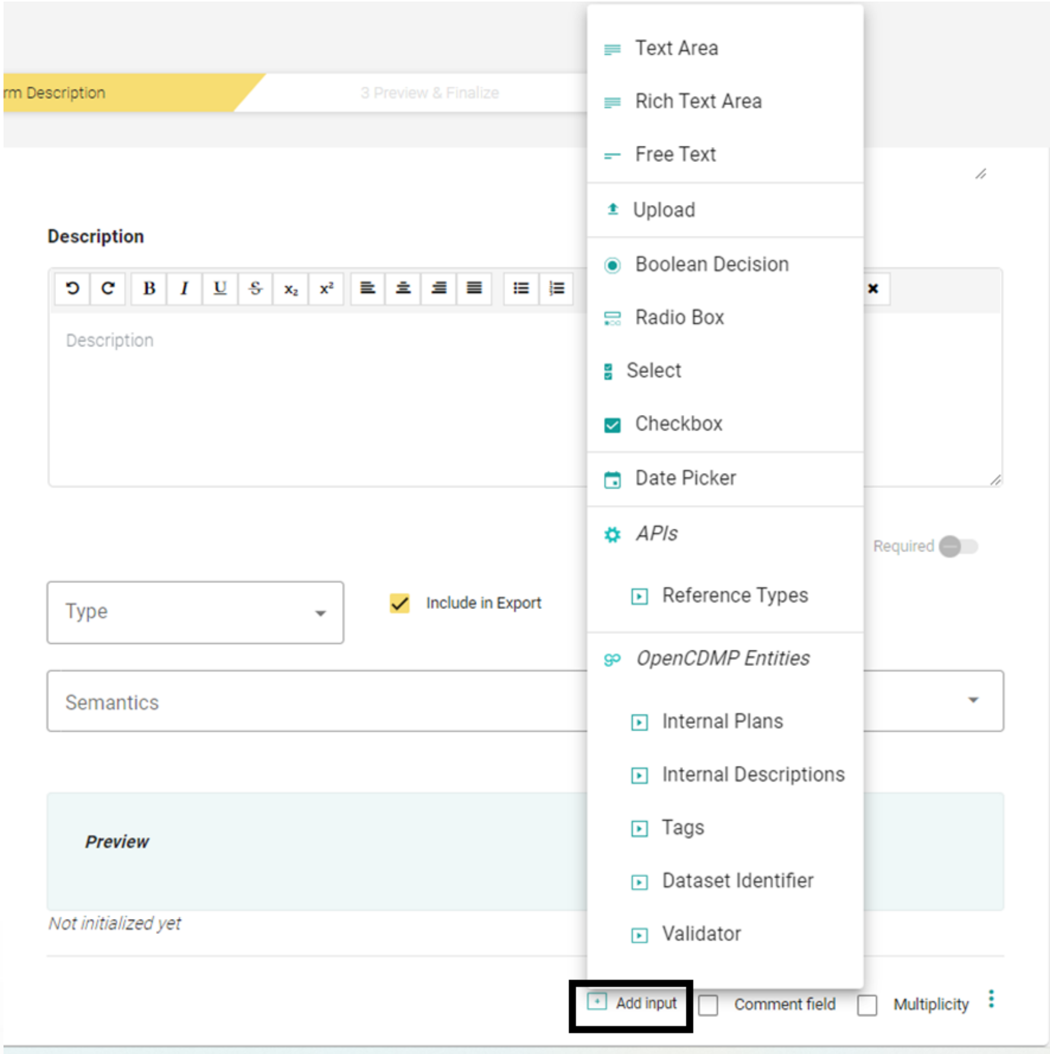


Figure 30. Add input

2.3.7 Input Placeholder

Add a descriptive text to help users with their answer.

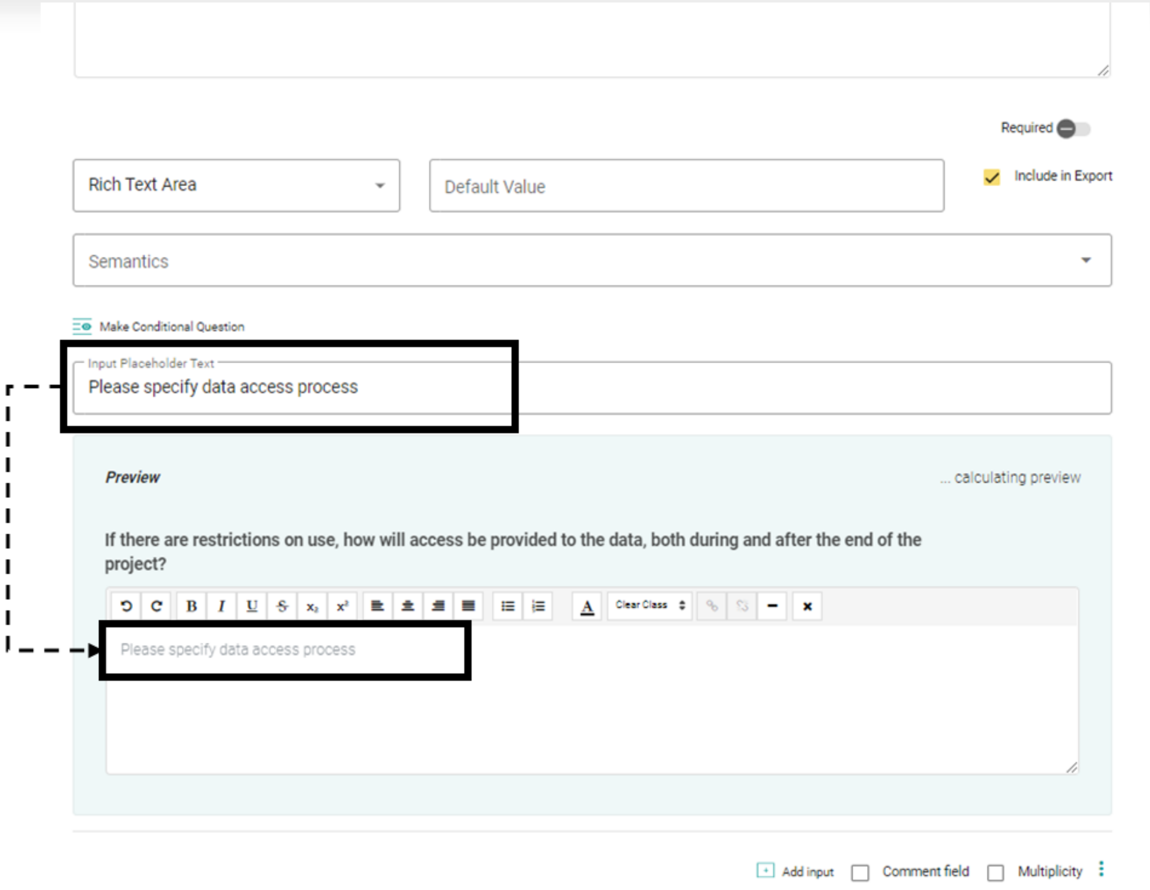


Figure 31. Input Placeholder

* For questions that are designed to accept multiple inputs, this is a good way to distinguish the type of inputs required per answer.

2.3.8 Comment field

Adds an extra free text field to the question. The field is by default configured to receive input that is intended to be used as 'additional information' text with placeholder text "Please specify".

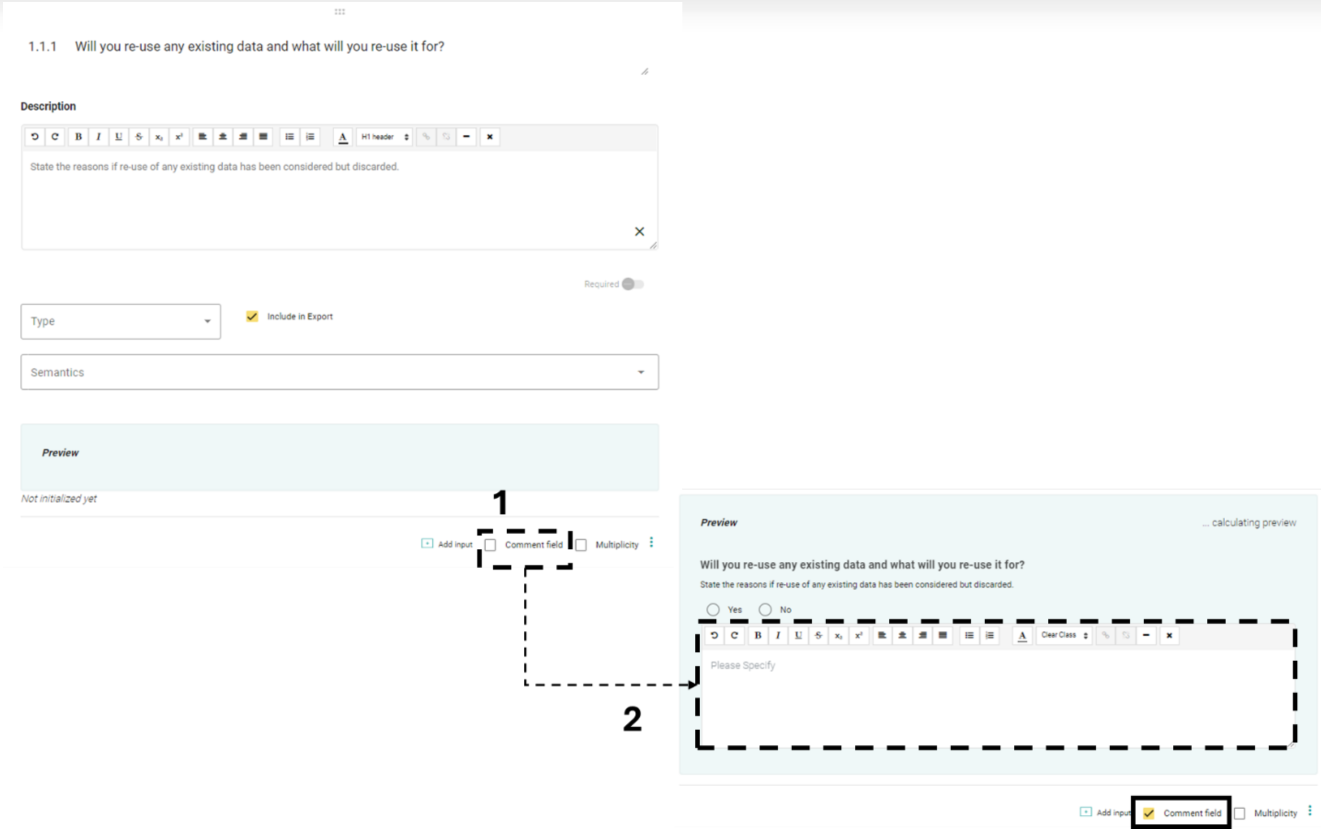


Figure 32. Comment Field

2.3.9 Multiplicity

Control how many times the users can add their input to answer the same question(s).

Arrange the min-max with numbers that indicate the amount of times that input can be provided for the question(s).

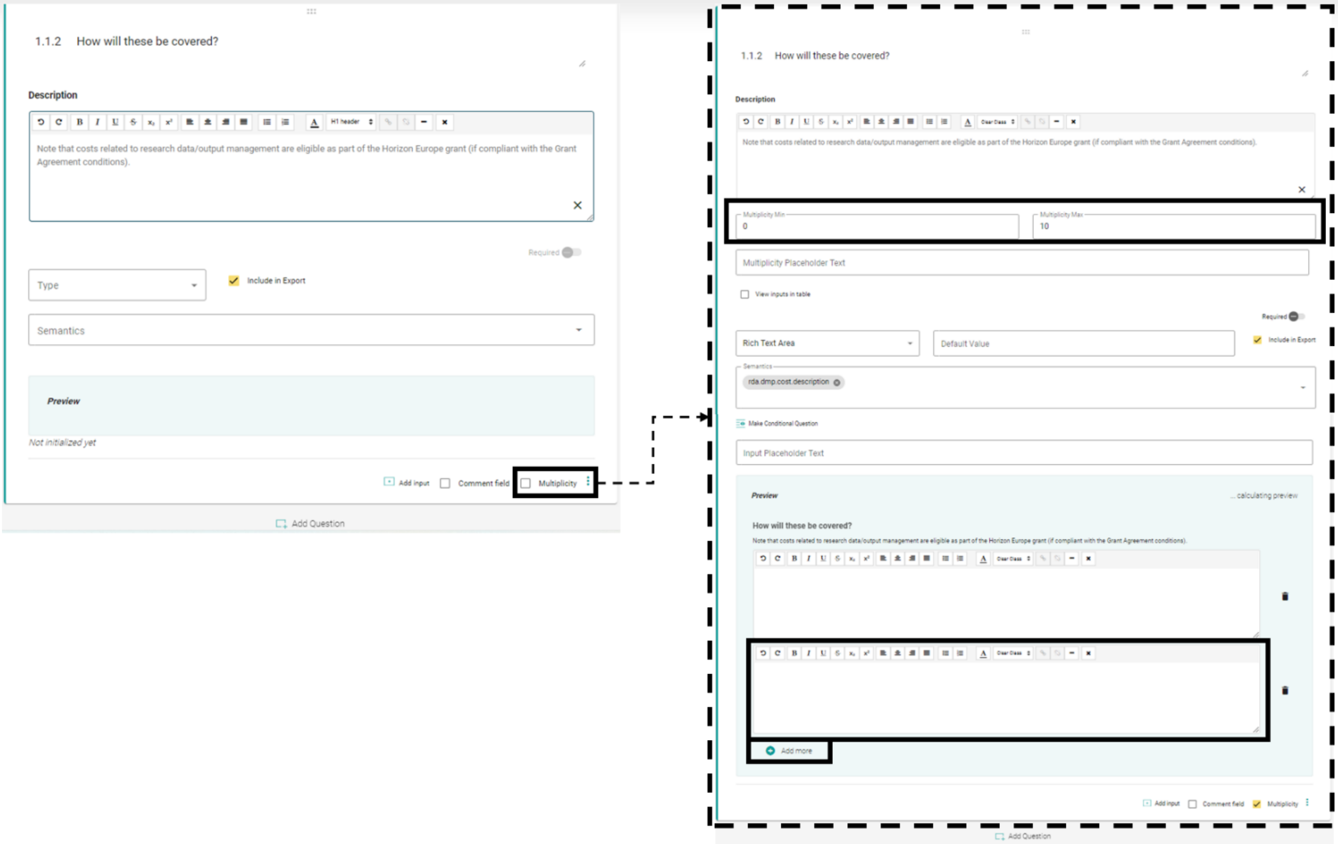


Figure 17. Multiplicity

2.3.10 Table

To create a machine actionable table in **ARGOS** you can use the multiplicity feature (see above). By clicking, *"View inputs in table"* checkbox the different type fields become columns that get title from the input placeholder.

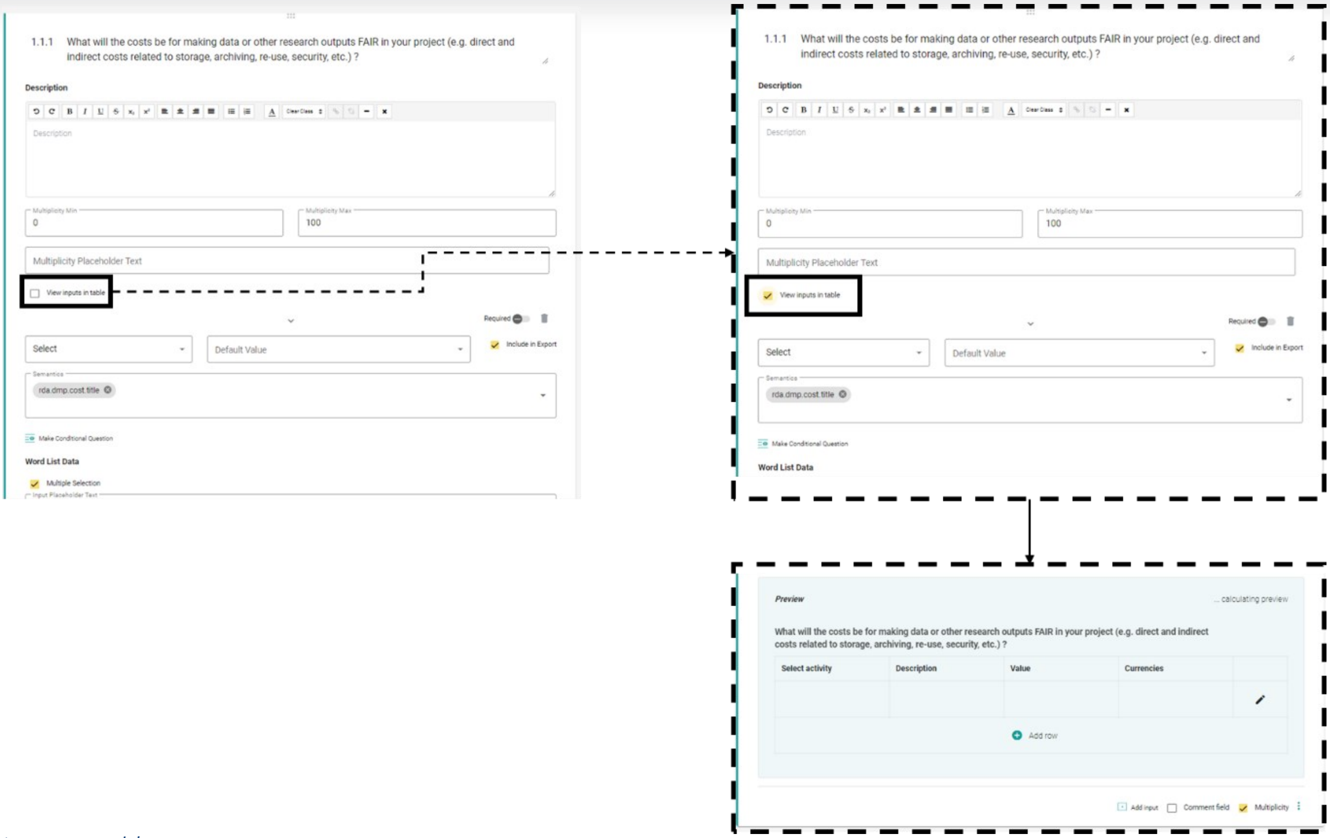


Figure 18. Table

2.3.11 Description

Add a Description to a given question. Add more information with the Extended Description or/and Additional Information. The description area is placed below the question by default. The user can check/uncheck the Description, Extended Description and/or Additional Information to the icon with the three bullets.

- ➢ Description/Extended Description/Additional Information Area

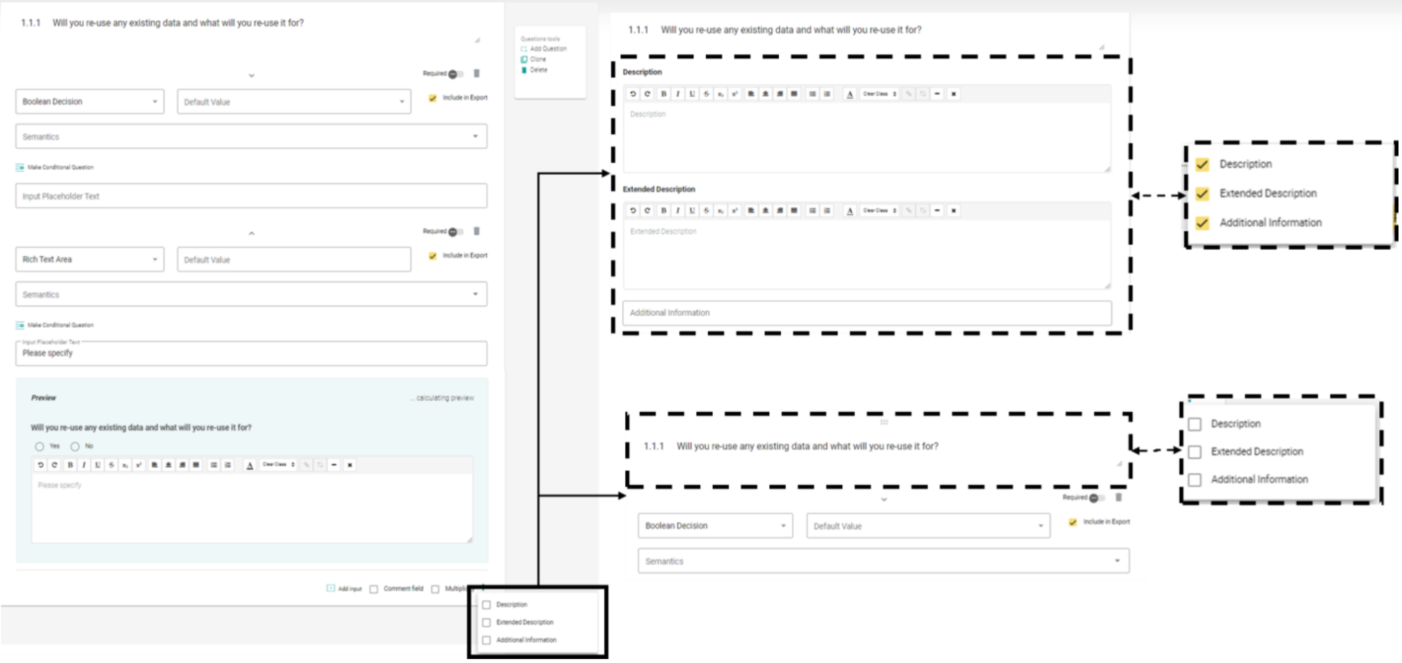


Figure 34. Description

*Additional Information appears as a tip ( ):

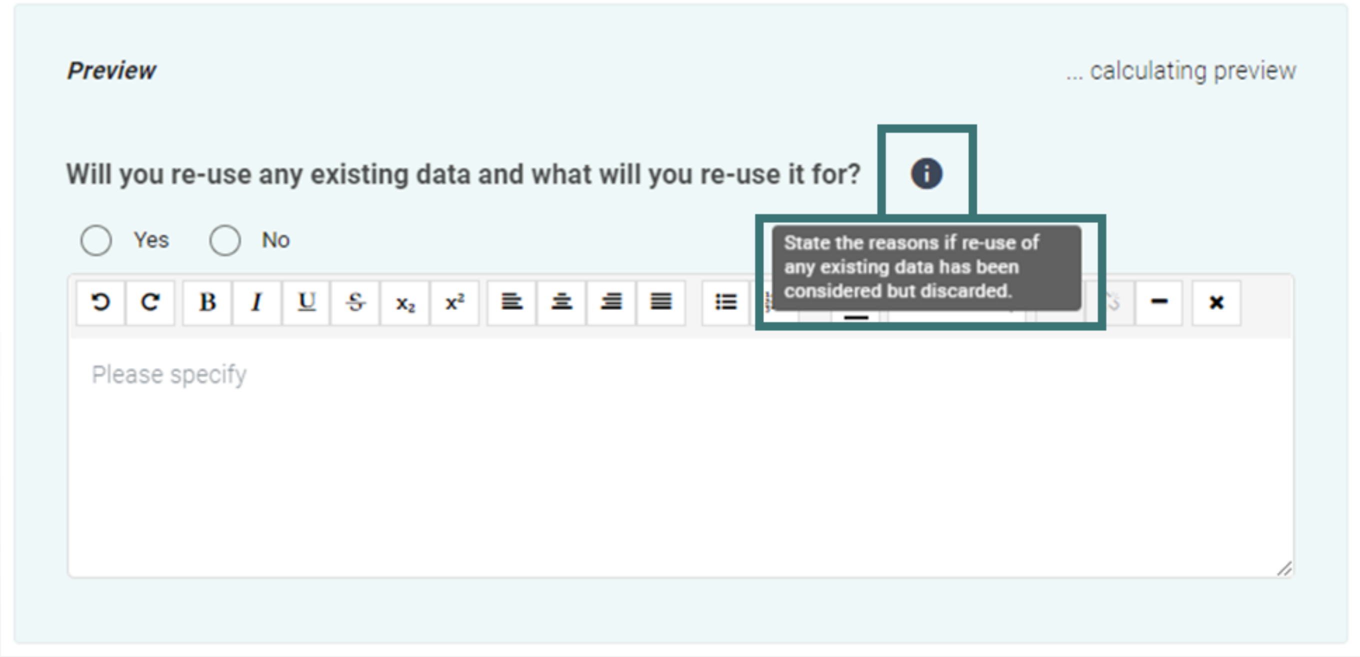


Figure 35. Additional Information

Step 3: *Preview & Finalize*

The third and the last step to Create a Description Template is *3. Preview & Finalize*.

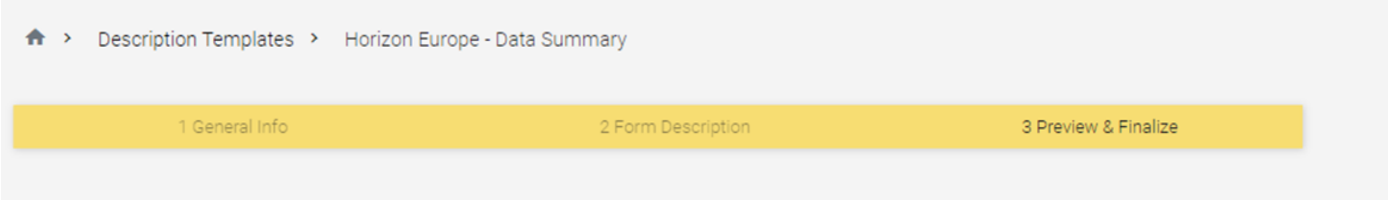


Figure 19. Third Step

3.1 Preview

Preview the New Description Template that you created in [Step 2. Form Description]() before finalized.

The following picture is a snapshot of the screen:

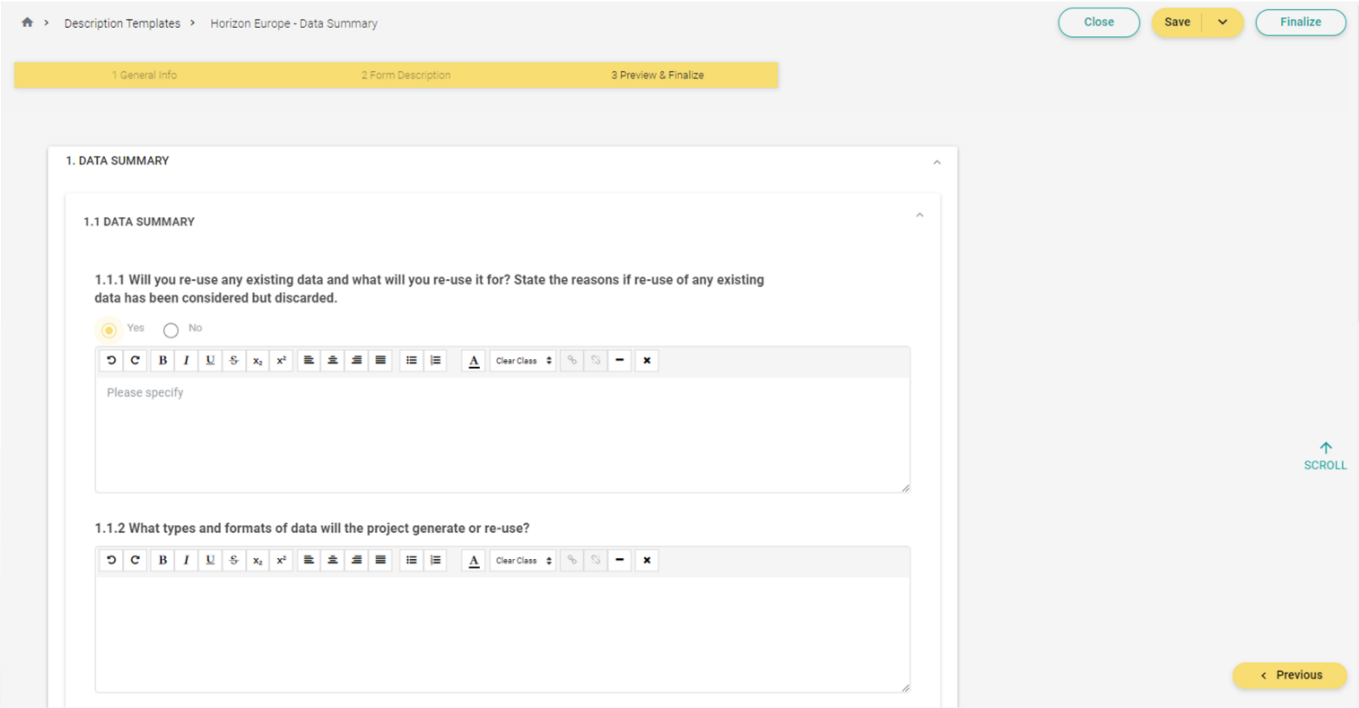


Figure 20. Preview

3.2 Finalize

Publish the Template and make it visible to the users. Finalized Templates are immediately added in the Plan collection and are ready for use by **ARGOS'** users.

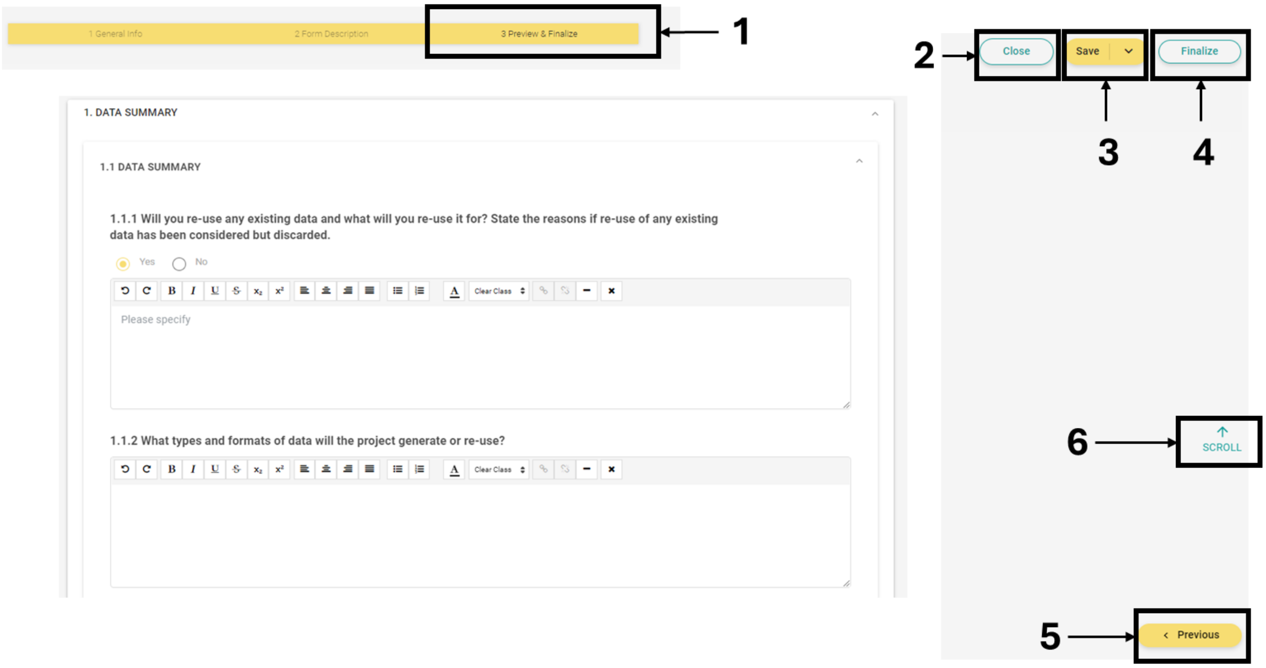


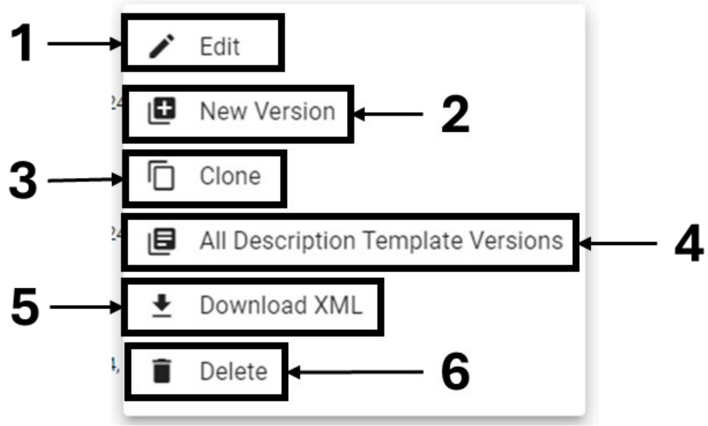
Figure 21. Finalize

1. **Preview & Finalize** – *you are in the third step*
2. **Close** – *rejects the Description Template and returns to the main menu*
3. **Save** – *saves the Description Template as a Draft Template*
4. **Finalize** – *publishes the Dataset Template*
5. **Previous** – *moves to [Step 2. Form Description]*
6. **Scroll** – *moves to the top of the page*

Description Template's editing tools

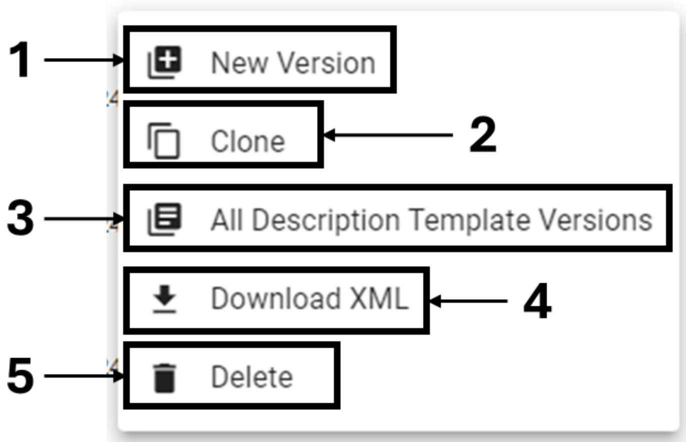
In **ARGOS,** the templates there are some extra features which support more actions to the template.

A. Draft Description Template



6. **Edit** - *edits the Description Template*
7. **New Version** - *creates a new version of the Description Template*
8. **Clone** - *creates a copy of the Description Template*
9. **All Description Template Versions** - *preview all the versions of the Description Template*
10. **Download XML** - *downloads the Description Template in xml format*
11. **Delete -** *erase the Description Template*

B. Finalised Description Template



6. **New Version** - *creates a new version of the Description Template*
7. **Clone** - *creates a copy of the Description Template*
8. **All Description Template Versions** - *preview all the versions of the Description Template*
9. **Download XML** - *downloads the Description Template in xml format*
10. **Delete -** *erase the Description Template*

Description Type

Define the type of each Description Template based on the content it refers to, eg dataset, software, ethics, etc.

Create Description Type

To create a Description Type, you need to click on

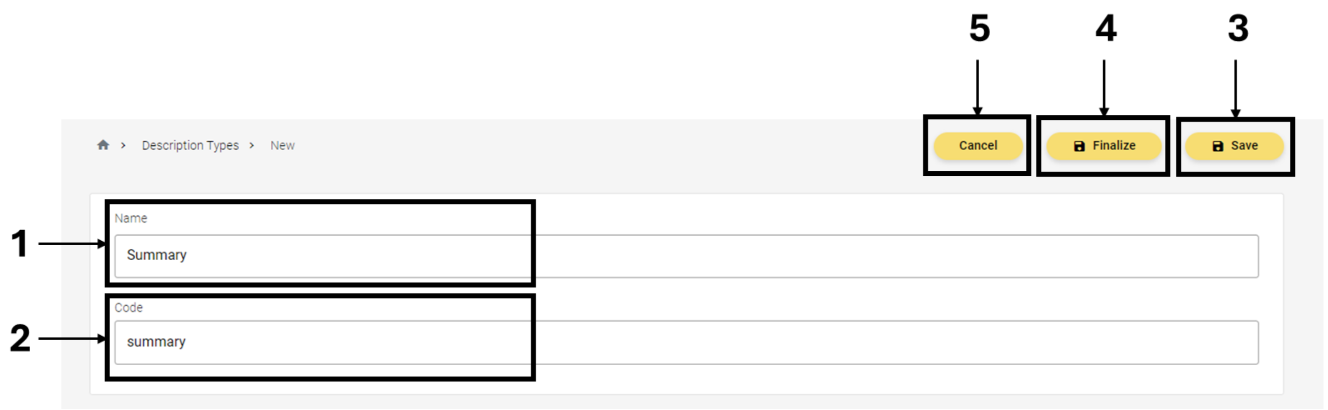
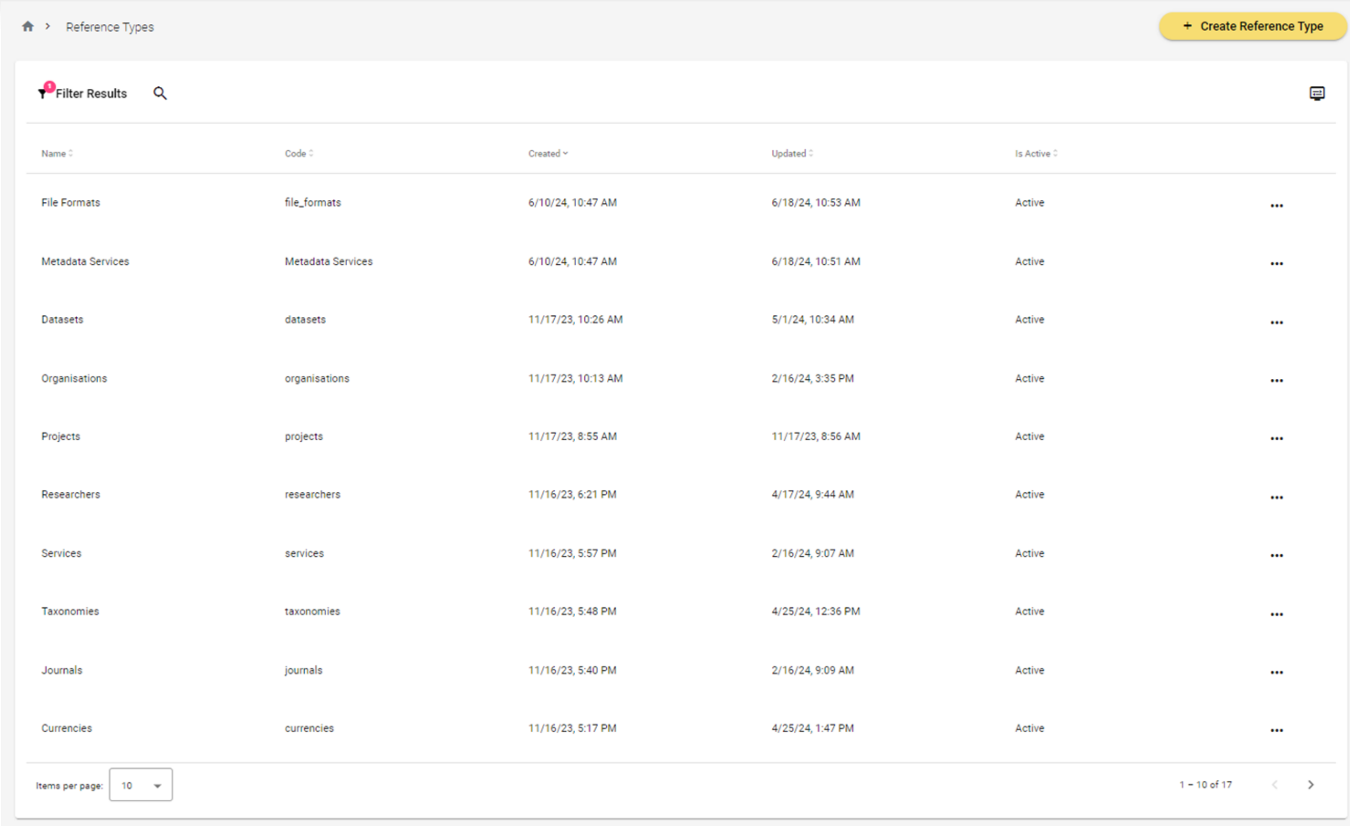


Figure 22. Creation of Description Type

1. **Name** – *give a name to the type*
2. **Code** – *give the code of the type*
3. **Save** – *save the changes*
4. **Finalise** – *finalise the type*
5. **Cancel** – *reject the New Description Type*

Reference Types*

Extra *Reference Types* can be added to enrich the Plans. This is handled by **ARGOS'** team.

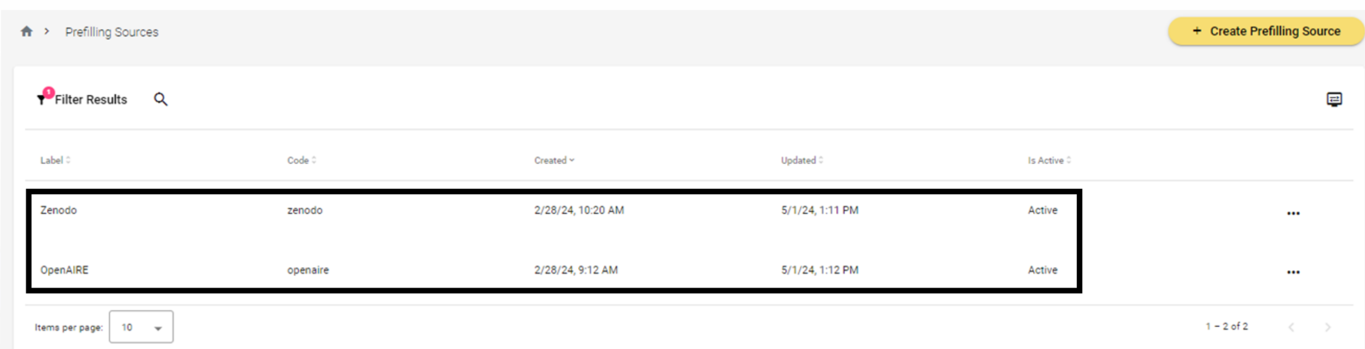


Name	Code	Created	Updated	Is Active
File Formats	file_formats	6/10/24, 10:47 AM	6/18/24, 10:53 AM	Active
Metadata Services	Metadata Services	6/10/24, 10:47 AM	6/18/24, 10:51 AM	Active
Datasets	datasets	11/17/23, 10:26 AM	5/1/24, 10:34 AM	Active
Organisations	organisations	11/17/23, 10:13 AM	2/16/24, 3:35 PM	Active
Projects	projects	11/17/23, 8:55 AM	11/17/23, 8:56 AM	Active
Researchers	researchers	11/16/23, 6:21 PM	4/17/24, 9:44 AM	Active
Services	services	11/16/23, 5:57 PM	2/16/24, 9:07 AM	Active
Taxonomies	taxonomies	11/16/23, 5:48 PM	4/25/24, 12:36 PM	Active
Journals	journals	11/16/23, 5:40 PM	2/16/24, 9:09 AM	Active
Currencies	currencies	11/16/23, 5:17 PM	4/25/24, 1:47 PM	Active

Figure 23. Reference Types

Prefilling Sources*

Additional *Prefilling Sources* can be included after request to the **ARGOS'** team.



Label	Code	Created	Updated	Is Active
Zenodo	zenodo	2/28/24, 10:20 AM	5/1/24, 1:11 PM	Active
OpenAIRE	openaire	2/28/24, 9:12 AM	5/1/24, 1:12 PM	Active

Figure 24. Prefilling Sources

Tenant Configuration

Adjusts the settings of each tenant.

*These features are handled by the ARGOS' Super Users. Please contact argos@openaire.eu for more information.

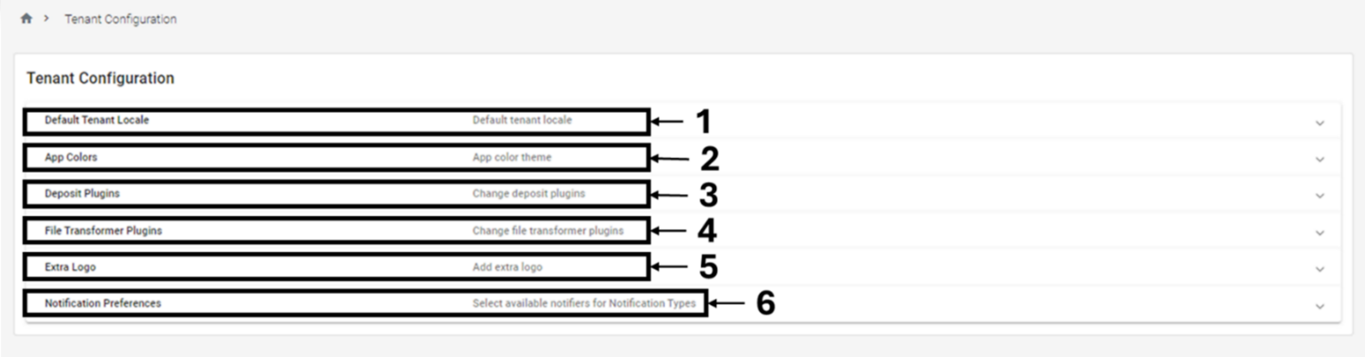


Figure 25. Tenant Configuration

4.1 Default Tenant Locale

Select the default settings that apply to the whole tenant.
Note: *Each user can still change these settings in their profile according to personal preferences.*

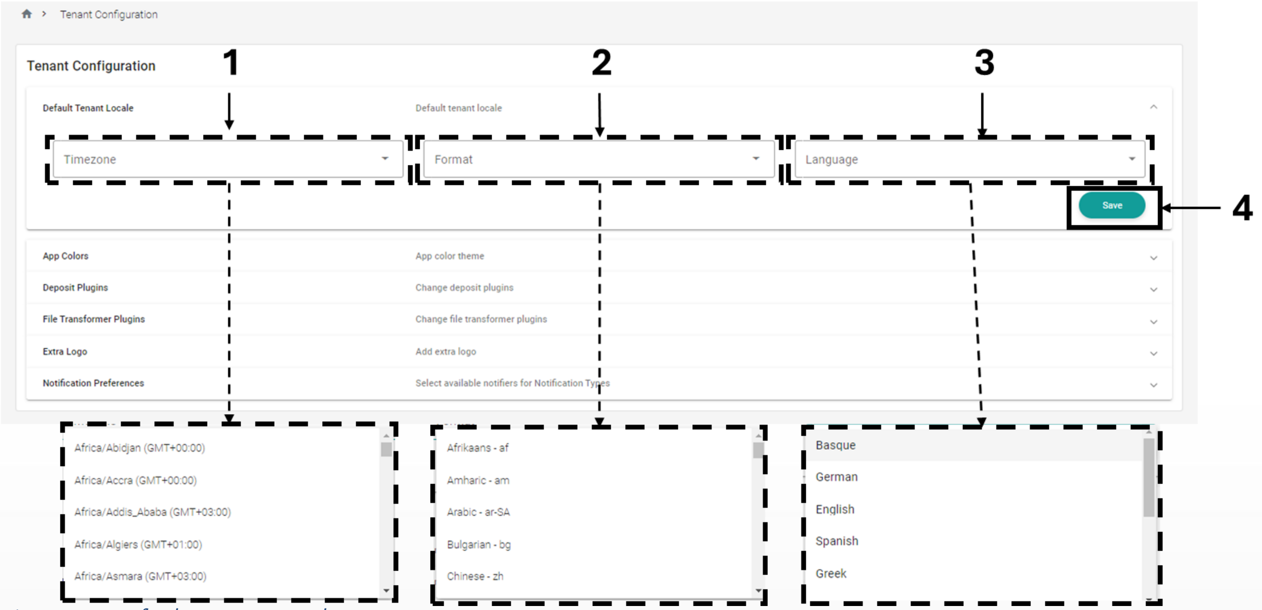


Figure 26. Default Tenant Locale

1. **Timezone** – *defines the timezone of the tenant*
2. **Format** - *defines the way that date and hour will be launched in the service*
3. **Language** – *localization of the tenant*
4. **Save** – *saves the changes of this section*

4.2 App Colors

Changes the colors of the service to the organisation's colors.

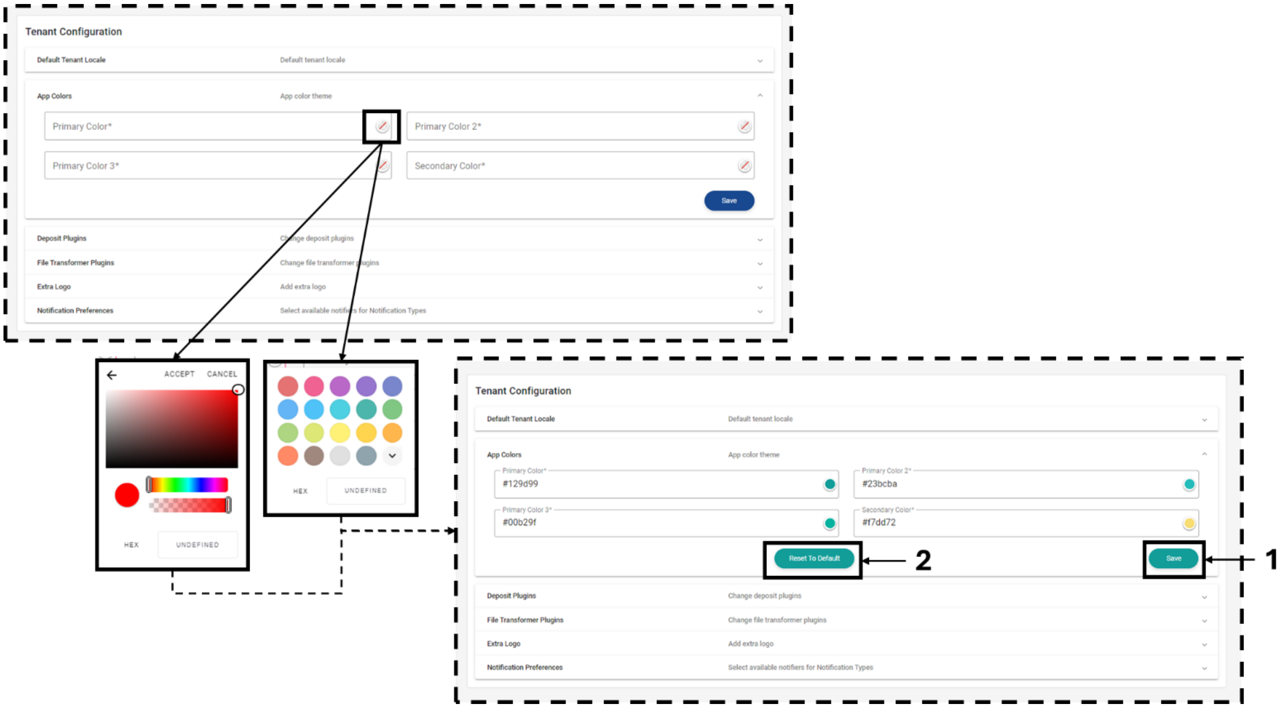


Figure 27. App Colors

There are some suggested colors or there is the ability to select the shade or transparency.

1. **Save** – *saves the changes*
2. **Reset to default** – *rejects all the changes*

4.3 Deposit Plugins*

Adds extra repositories to deposit the Plans.

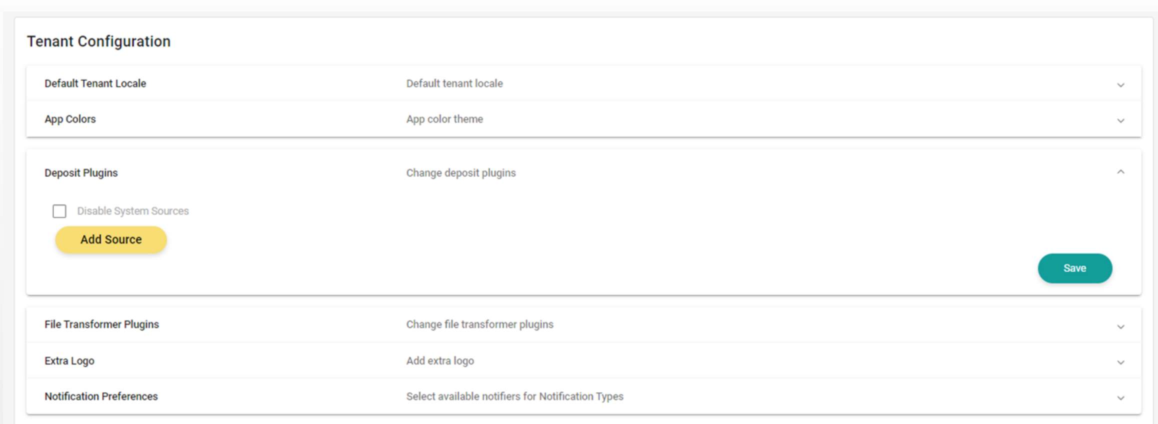


Figure 28. Deposit Plugins

*These features are handled by the ARGOS' Super Users. Please contact argos@openaire.eu for more information.

4.4 File Transformer Plugins*

Adds alternative formats to export the Plans.

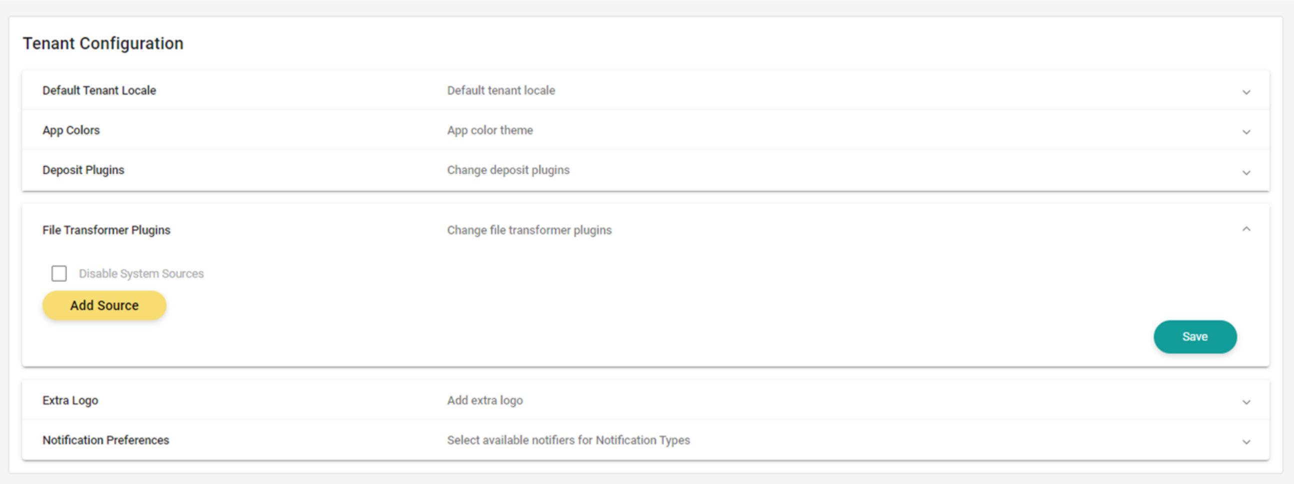


Figure 29. File Transformer Plugins

4.5 Extra Logo

Uploads the logo of the organization that is always displayed next to **ARGOS'** logo.

*These features are handled by the ARGOS' Super Users. Please contact argos@openaire.eu for more information.

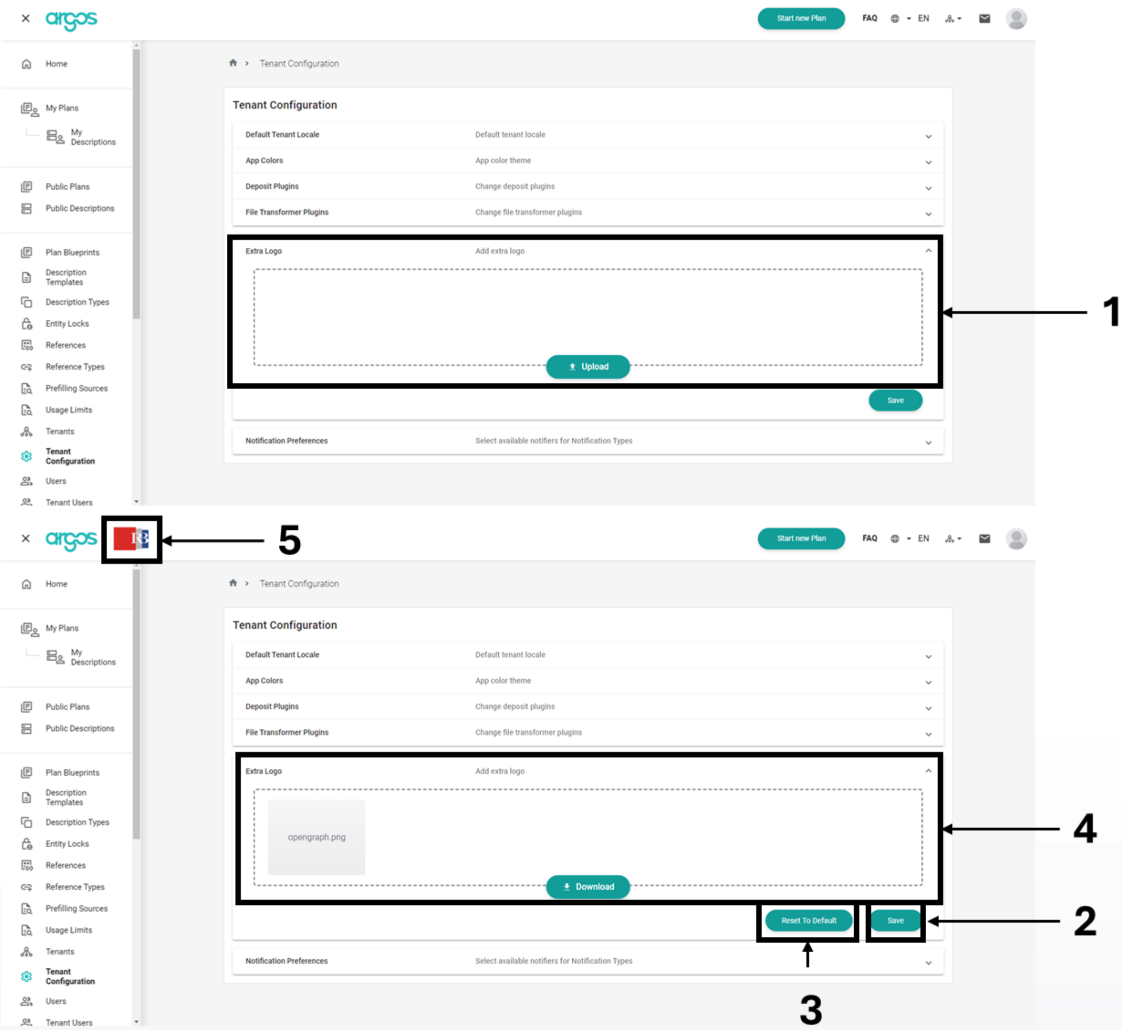


Figure 30. Extra logo

1. **Upload** – *adds the logo*
2. **Save** – *saves the changes*
3. **Reset to Default** – *rejects all the changes*
4. **Download** – *exports the logo*
5. **Logo** – *the extra logo next to the* **ARGOS'** *logo*

4.6 Notification Preferences

Sets the tenant configuration for notifications. Below there are the different actions which **ARGOS** sends notifications for.

The first choice will be used by default. Alternatively if the notification doesn't reach the user through the first option, then the notification will be available via the second option that has been selected.

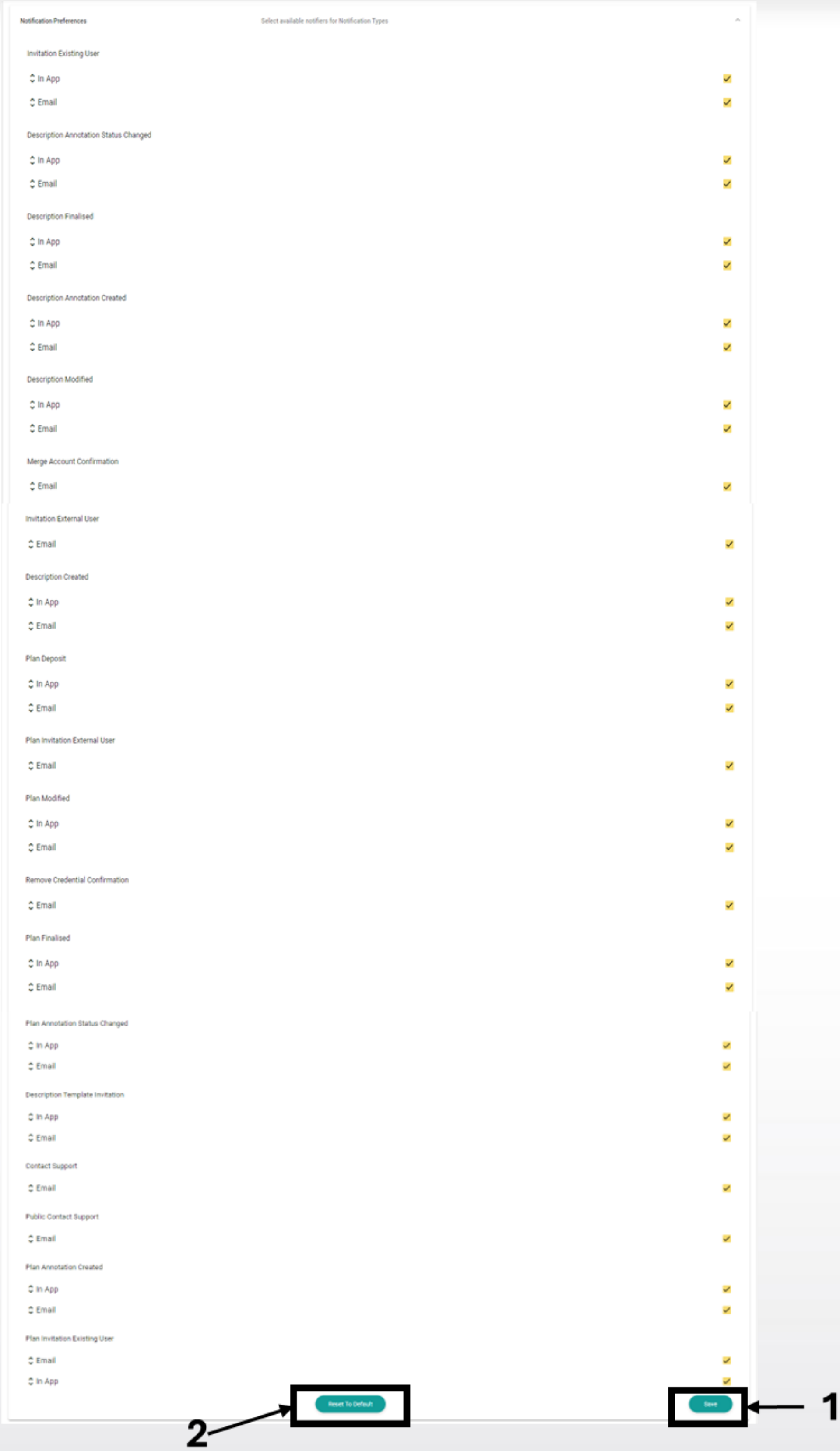


Figure 31. Notification Preferences

1. **Save** – *saves the changes*
2. **Reset to default** – *rejects all the changes*

Tenant Users

Includes a list of tenant users and their role. The role of the tenant user can be changed there.

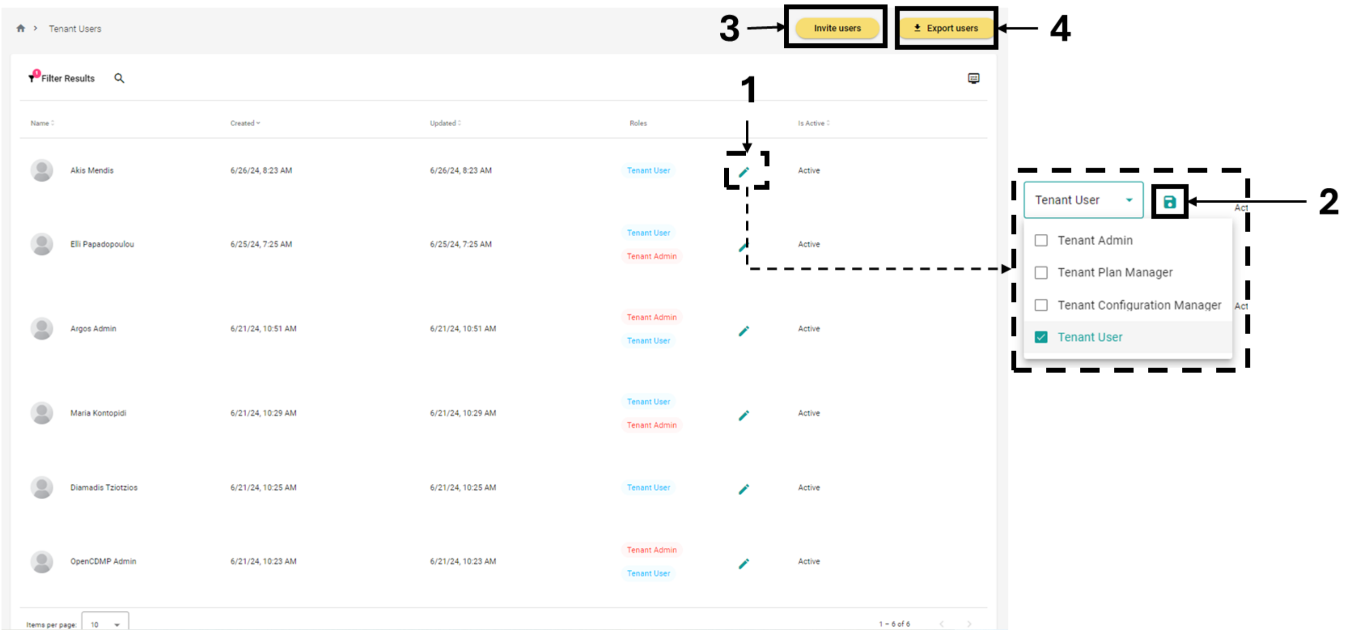


Figure 32. Tenant Users

1. **Pen icon** – *edits the roles of the tenant user*
2. **Save icon** – *saves the changes*
3. **Invite users** – *pop up to invite users to the tenant*
4. **Export users** – *downloads the user list*

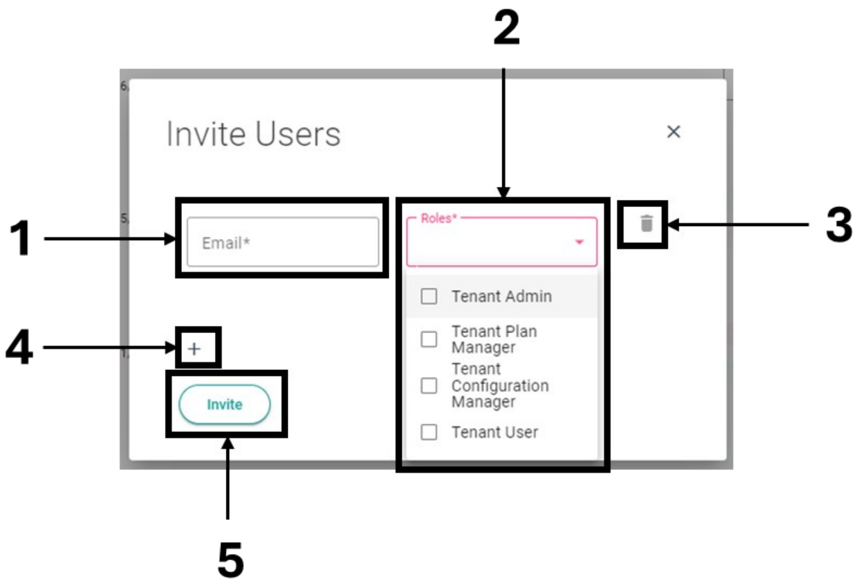


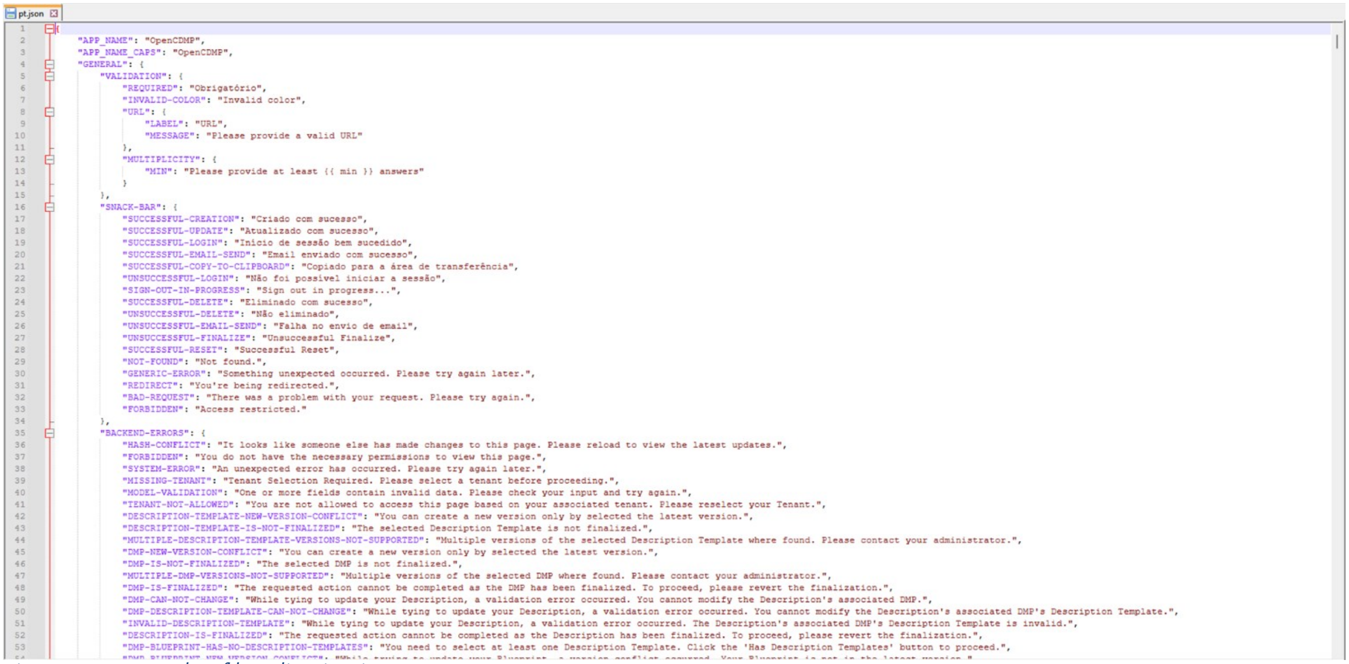
Figure 33. Pop up invitation users

1. **Email field** – *the user's email*
2. **Roles** – *selects the roles*
3. **Bin button** – *removes the user*
4. **Plus button** – *adds a row*
5. **Invite button** – *sends the invitation*

Languages*

For the localization of **ARGOS** we send the .json file for translation of the orders and then we update the service accordingly.

*These features are handled by the ARGOS' Super Users. Please contact argos@openaire.eu for more information.



pt.json

```json
{
    "APP_NAME": "OpenCDMP",
    "APP_NAME_CAPS": "OpenCDMP",
    "GENERAL": {
        "VALIDATION": {
            "REQUIRED": "Obrigatório",
            "INVALID-COLOR": "Invalid color",
            "URL": {
                "LABEL": "URL",
                "MESSAGE": "Please provide a valid URL"
            },
            "MULTIPLICITY": {
                "MIN": "Please provide at least {{ min }} answers"
            }
        },
        "SNACK-BAR": {
            "SUCCESSFUL-CREATION": "Criado com sucesso",
            "SUCCESSFUL-UPDATE": "Atualizado com sucesso",
            "SUCCESSFUL-LOGIN": "Inicio de sessão bem sucedido",
            "SUCCESSFUL-EMAIL-SEND": "Email enviado com sucesso",
            "SUCCESSFUL-COPY-TO-CLIPBOARD": "Copiado para a área de transferência",
            "UNSUCCESSFUL-LOGIN": "Não foi possivel iniciar a sessão",
            "SIGN-OUT-IN-PROGRESS": "Sign out in progress...",
            "SUCCESSFUL-DELETE": "Eliminado com sucesso",
            "UNSUCCESSFUL-DELETE": "Não eliminado",
            "UNSUCCESSFUL-EMAIL-SEND": "Falha no envio de email",
            "UNSUCCESSFUL-FINALIZE": "Unsuccessful Finalize",
            "SUCCESSFUL-RESET": "Successful Reset",
            "NOT-FOUND": "Not found.",
            "GENERIC-ERROR": "Something unexpected occurred. Please try again later.",
            "REDIRECT": "You're being redirected.",
            "BAD-REQUEST": "There was a problem with your request. Please try again.",
            "FORBIDDEN": "Access restricted."
        },
        "BACKEND-ERRORS": {
            "HASH-CONFLICT": "It looks like someone else has made changes to this page. Please reload to view the latest updates.",
            "FORBIDDEN": "You do not have the necessary permissions to view this page.",
            "SYSTEM-ERROR": "An unexpected error has occurred. Please try again later.",
            "MISSING-TENANT": "Tenant Selection Required. Please select a tenant before proceeding.",
            "MODEL-VALIDATION": "One or more fields contain invalid data. Please check your input and try again.",
            "TENANT-NOT-ALLOWED": "You are not allowed to access this page based on your associated tenant. Please reselect your Tenant.",
            "DESCRIPTION-TEMPLATE-NEW-VERSION-CONFLICT": "You can create a new version only by selected the latest version.",
            "DESCRIPTION-TEMPLATE-IS-NOT-FINALIZED": "The selected Description Template is not finalized.",
            "MULTIPLE-DESCRIPTION-TEMPLATE-VERSIONS-NOT-SUPPORTED": "Multiple versions of the selected Description Template where found. Please contact your administrator.",
            "DMP-NEW-VERSION-CONFLICT": "You can create a new version only by selected the latest version.",
            "DMP-IS-NOT-FINALIZED": "The selected DMP is not finalized.",
            "MULTIPLE-DMP-VERSIONS-NOT-SUPPORTED": "Multiple versions of the selected DMP where found. Please contact your administrator.",
            "DMP-IS-FINALIZED": "The requested action cannot be completed as the DMP has been finalized. To proceed, please revert the finalization.",
            "DMP-CAN-NOT-CHANGE": "While tying to update your Description, a validation error occurred. You cannot modify the Description's associated DMP.",
            "DMP-DESCRIPTION-TEMPLATE-CAN-NOT-CHANGE": "While tying to update your Description, a validation error occurred. You cannot modify the Description's associated DMP's Description Template.",
            "INVALID-DESCRIPTION-TEMPLATE": "While tying to update your Description, a validation error occurred. The Description's associated DMP's Description Template is invalid.",
            "DESCRIPTION-IS-FINALIZED": "The requested action cannot be completed as the Description has been finalized. To proceed, please revert the finalization.",
            "DMP-BLUEPRINT-HAS-NO-DESCRIPTION-TEMPLATES": "You need to select at least one Description Template. Click the 'Has Description Templates' button to proceed.",
```

Figure 34. Example of localisation in .json

Supportive Material

Creates the content for the supportive material of the tenant.

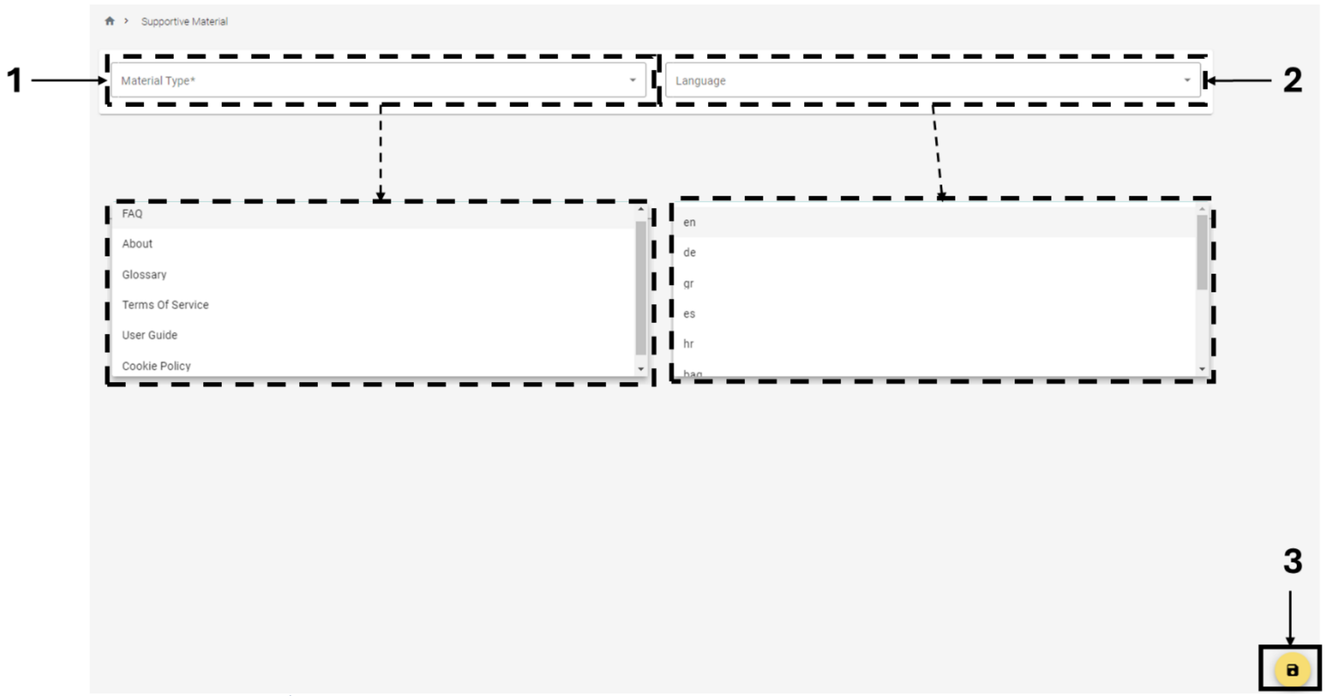
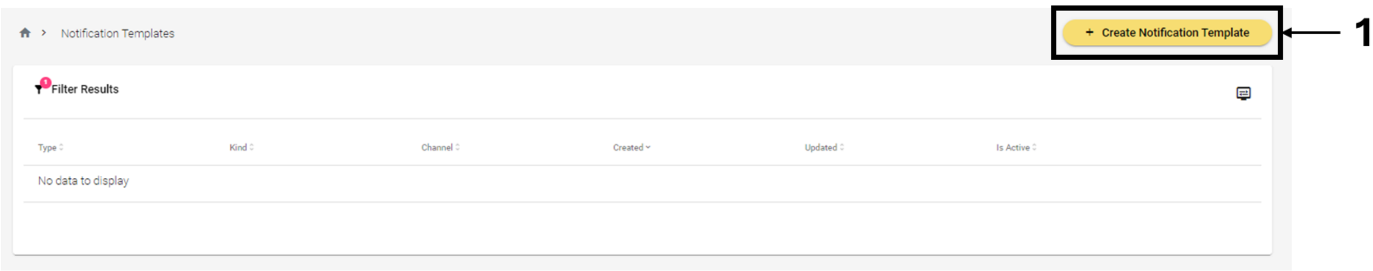


Figure 35 Supportive Material

1. **Material Type** – *selects the type to update (FAQ, About, Glossary, Terms of Service, User Guide and Cookie Policy)*
2. **Language** – *selects the localisation and launches the file*
3. **Save** – *saves the changes*

Notification Templates*

Creates custom notifications that will be sent to the users’ tenant.



1. **Create Notification Template** – *creates the template of a notification which will be sent only to the user's tenant.*

*These features are handled by the ARGOS' Super Users. Please contact argos@openaire.eu for more information.

Glossary

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A Plan is a document describing the processes that the data have undergone and the tools used for their handling and storage during a research lifecycle. Most importantly, Plans secure provenance and enable re-use of data, software and other research outputs by appointing data managers and by including information on how data, software and other research outputs can be re-used by others in the future. Therefore, a Plan is a living document which is modified according to the data developments of a project before it's completed and handed over at the end of the project. Public funders increasingly contain Plans in their grant proposals or policy funding requirements.

A good paradigm is the European Commission demands for the production and delivery of Plans for projects funded under the Horizon Europe Funding Programme. On that note, and to encourage good output management practices uptake, many European institutions include Plans in post-graduate researchers policies and offer relevant support to staff and students.

Plan Blueprint

Plan Blueprint contains general but vital information about the name and the duration of the project that the Plan corresponds to, the contributing organisations and individuals as well as the datasets that are under the Dataset Description section. It also offers the possibility of describing datasets other than primary data generated, under "External References" section. A Plan Blueprint can have many Dataset Descriptions.

Description

Description documents the management processes of datasets, software and other research outputs following funder's or institution's requirements. A description is essentially a questionnaire template with underlying added value services for interoperability and machine readability of information which is developed based on the given requirements. Management requirements differ from funder to funder and from institution to institution, hence the growing collection of Descriptions to select from. Moreover, a Description links to the documentation of one dataset, hence a Plan Blueprint may contain more than one descriptions on the occasion when multiple research outputs were used during the project. When documentation of some of the project's outputs falls under additional requirements (e.g. projects receiving multiple grants from different sources), there is the possibility of describing research outputs with more than one Description template.

Administrator

An administrator can be any **ARGOS** user, who has requested advanced rights. Additional features appear on the left side of the home page of the administrator after logging in. An administrator can create Plan Blueprints and Description Templates, can manage/export the rights of other administrators, and make changes to the Language and the guide with the use of the editors that are available.

The role of the administrator can be divided into smaller roles: (1) the Tenant Plan Manager and (2) the Tenant Configuration Manager.

The Tenant Plan Manager can only create Plan Blueprints, Description Templates and Description Types.

The Tenant Configuration Manager is responsible for Languages, Supportive Material and Notification Templates.

Workflow

The administrator creates Description Templates defining the description of a dataset, software or other research outputs. The description of a dataset, software or other research outputs is a set of questions created by the administrator following three steps.

Metadata

In the semantic web, the extention of the World Wide Web (www), metadata represents other data, following specific standards and made them findable, accessible, interoperable and reusable.