Ocean Best Practices System

Guidelines for Depositors

Version 2024-03-31

Welcome to **OceanBestPractices**, the repository of community practices in ocean research, applications, operations and data and information management.

IMPORTANT
Before submitting to OBPS Repository please also read the Repository Policy and Terms of Use

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Document Inclusion Policy and Guidelines

This section defines the parameters of content that are appropriate for a document to be deposited into the OBPS Repository. The OBPS Repository Team, in consultation with experts in the respective field, has the right to reject any deposit not deemed to be within the content scope of the repository.

- Deposits should be made on the understanding that the content is a contribution to the methodological base of the ocean community. Importantly, the document title and abstract and methods body text should describe its methods focus.
- The focus of the content should be methodologies applied in ocean-related sciences (see Methodology Scope)
- Methodologies should support global and regional interoperability across the ocean information value chain from requirement setting, through observations to data management and ultimately to the end user applications and societal impacts

Thematic and Environment

The OBPS Repository thematic scope includes a range of ocean-related topics such as methods/practices in ocean and related sciences research, data and information and applications across the ocean value chain representing disciplines such as: biology, chemistry/geochemistry, computing/data management, environment/pollution,geology/geophysics, meteorology/atmosphere, physical oceanography, research support, resources/fisheries, technology/engineering, modeling and analyses, administration and social sciences such as ethics, Interdisciplinary topics and methods which impact knowledge of the oceans and that the ocean may impact.

The open ocean and coastal environment scope for the repository extends from the deep waters of the open ocean to estuarine/brackish and freshwater environments.

Methodology Scope

As a guide, the following are types of methodologies accepted into the repository:

- Guidelines & Policies: A set of conventions and options to advice action; an indication or outline of conduct. Policies are

generally high-level guidelines on expected or acceptable behaviour, especially of a governmental body

- Method: A documented procedure, a step-by-step set of instructions for accomplishing a task. Examples include manuals, scientific/medical protocols, standard test methods and standard practices (e.g. standard operating procedures)
- Methodological commentary/perspective: Narrative reflections on or discussion of a methodological document
- Description of a metrology standard: Documentation of a physical standard or procedure used for metrology (e.g. a manufactured object used to calibrate sensors)
- Open Standards for observations, data management, modeling, visualization and applications.
- Specification of criteria: a description of requirements (e.g. a technical, quality assurance and inclusivity requirements) that a methodology should comply with in order to fulfill the expectations of a community or organisation
- Reports with methodological relevance: a report of any activity which has relevance to methodology (e.g. a set of existing methods were compared, a report on a field expedition where new technology was tested, or a report on a computational benchmarking experiment)
- Training/Educational material: Documents designed specifically for training and/or educational activities, rather than to accomplish a task in an operational context.

Methodology types can be published as :

Equipment User Manuals
From developer/manufacturer. Good for assembly and for deployment, Specs often recorded in unrealistic environment
Standard Operating Procedures (SOP)
Very comprehensive one parameter, one problem description,
Describe method and not nuances of specific design
Best Practices (guides, manuals, cookbooks, etc)
Practical knowledge plus elements of the two above categories. Often developed for specific environments, phenomenon or platforms and by single experts or institutions.
(Certified) Reference Materials
Provide trusted reference for calibration and quality control
Published Papers
Methodology/protocol described in a published journal/book article.

Best Practices Documents (OBPS Templates available)
Written by **practitioners** for the **community,** often used as the basis for a published peer review article.
Training Courses
Documentation and video that includes the content of the training course

Spatial

The OBPS Repository is global in its geographic coverage.
To enable discovery of methods applied to work in specific open ocean and coastal geographic regions, depositors should input geographic metadata derived from the interface-provided authorized geographic vocabularies.

Language

Methods published in multiple languages that are compliant with the above scopings, are accepted into the repository provided that in the metadata submitted they have an English title and abstract (and preferably in the document itself)

Registration

OceanBestPractices may be searched and files downloaded by anyone, but before you can deposit into **OceanBestPractices**, or save searches or set up an RSS feed you must first Register.
Go to **https://repository.oceanbestpractices.org/** and click on **Register** on the Right Hand sidebar of the Home Screen.

After you have submitted your registration, you will receive an email requesting you complete your User profile and to contact **info@oceanbestpractices.org** to discuss which Communities and Collections you wish to make deposits. If you do not receive this confirmation email from OceanBestPractices within three days of your registering, contact **info@oceanbestpractices.org** and query.

If there is no existing Community/Collection you want to deposit into, you can discuss if a new Community/Collection is required to be added for your use, or consider depositing into the Miscellaneous Community Practices Collection until you have a significant number of methodologies in the repository..

Once you have received confirmation of your registration and have agreed with OBPS Repository Manager which Communities/Collections you will deposit into, you may return to **OceanBestPractices** and **Login** (click either at the top RH of screen or bottom or RH sidebar).
If you have forgotten your password, click on ' Forgot your password?'

Submissions

Your login will take you in your Submissions and Workspace screen. On this screen, you will also see any earlier submissions either deposited or still in your own workspace.
You may start a **new submission** by clicking on *'You may **start a new Submission'.** * or you can start from the OceanBestPractices Home screen and click **Submissions** on the right hand sidebar.

If you wish to deposit a **new version** of a title already in the repository - this can only be done by ab OBPS Administrator (contact **info@oceanbestpractices.org**)

Item Submission Screen
Clicking on *'You may **start a new Submission'** * will open a series of screens where you can enter the metadata (descriptive information) about the item you wish to deposit.

Click the dropdown box and select a Collection (note you will only be presented with Collections into which you have been registered to make submissions). If your Community-Collection/s do not display in the dropdown contact **info@oceanbestpractices.org**
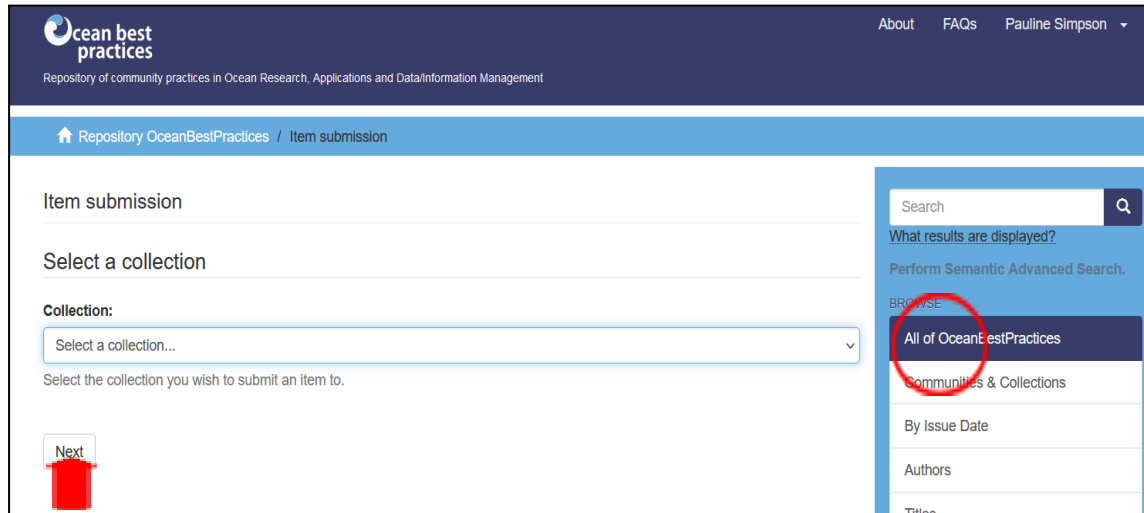
Describe Screen 1: Methodology Identification

At any stage, you can leave the submission process by clicking **Save & Exit** and the record will be saved in your workspace for you to work on later (after login your Workspace is displayed).

Select one of the **Document Types** by clicking on the 'button' alongside the item description. This selection then defines the metadata fields you will be presented with to complete. Mandatory fields to be completed are indicated with an * (Title; Year of Publication) **must** be filled with data.
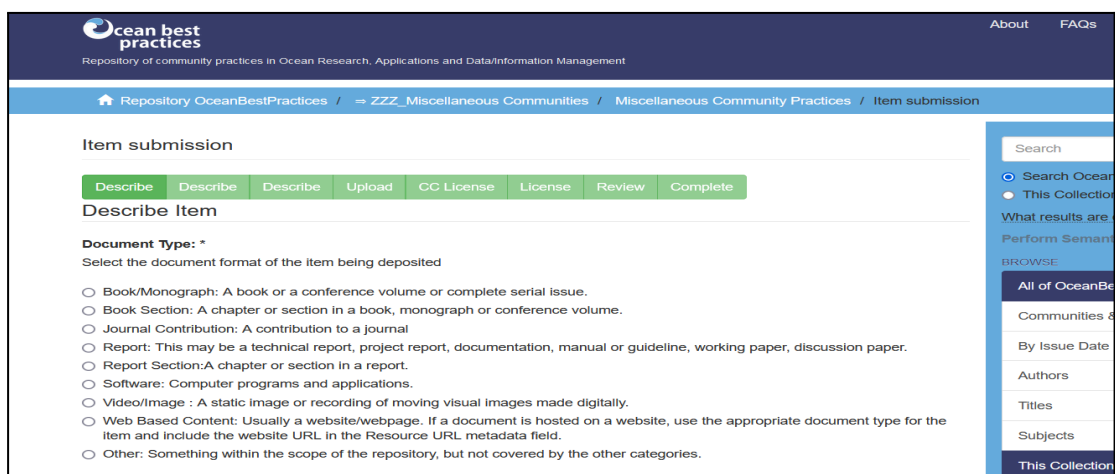
Use the dropdown selection to select the **Language** of the full text deposit. If it is an image or software select 'N/A'. If the language of the document is not listed select 'Other'

Language:

English ⌄

Select the language of the full text deposit. If the language does not appear in the list below, please select 'Other'. If the content does not really have a language (for example, if it is software, a dataset or an image) please select 'N/A'.

Methodology Identification

The following metadata is collected to identify the methodological category of your deposit.

Methodology Type
Click the dropdown box and select as many of the methodological types that apply to your deposit.   When selection is complete, click outside the selection box.

Methodology type:

Whatever the title or format of your work it should be deposited on the understanding that your document content is put forth by you as a contribution to the methodological base of the ocean community

▾

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N/A

Guidelines & Policies

Guidelines & Policies: A set of conventions and options to advice action; an indication or outline of conduct. Policies are generally high-level guidelines on expected or acceptable behaviour, especially of a governmental body

Method

Method: A documented procedure, a step-by-step set of instructions for accomplishing a task. Examples include manuals, scientific/medical protocols, standard test methods and standard practices (e.g. standard operation procedures)

Methodological commentary/perspect

Adoption Level
Select how broadly your deposit has been adopted/used

Adoption level:

☐ Novel (no adoption outside originators)

☐ Validated (tested by third parties)

☐ Organisational

☐ Multi-organisational

☐ National

☐ International

☐ N/A

Please indicate how broadly the uploaded methodology is used and/or adopted; please select all that apply.

Endorsement (author declared)

Please select from the left-hand dropdown, the category of practice/standard and

if applicable in the right-hand free text box if the deposit has been recommended for use by an organization. Click Add. If more than one organization has recommended complete the boxes again with the different organization names/s

Endorsement (external)

This last field for methodology identification and recommendation asks if your submission has been officially 'endorsed'/recommended by a recognised OBPS recognised endorsement group or authority. Only complete if the document has been 'officially endorsed'

Select from the left-hand dropdown the relevant response and add in the right-hand free text box the name of the group. If a certification of recommendation/'endorsement' is available, please upload that with the full text file. Click **Add**

Describe Screen 2 - Bibliographic metadata

Fill in information about your deposit for each of the applicable fields. **Remember different metadata fields will be presented for**

different document types, so you will not necessarily see all the following metadata fields when entering different document types eg. Report fields will be different to Journal Contribution

If provided click Add when you have entered the metadata in each field (this is so that you can input more than one entry – note when you press Add the metadata is displayed underneath the field Help text is provided for each metadata field
Mandatory fields are marked * and must be completed (**Title and Date)**

Author or Editors

As a rule, you should enter the authors/editor's names as they are presented in the publication you are depositing. enter the Last Name/First Name data and click Add. Every author listed in the publication should be added in the order given in the publication and click Add after each one is entered

Adding ORCID (author unique identifier)
Enter the author/editor Family name in Last Name and First name/s in that field then click LookUp. **Ensure that in the ORCID search box the last and first name are separated with a comma** eg. Smith, John. It will take a moment and you will be presented with a listing of authors/editors with last names/first names like the one you have entered. Click the name format you want to use and then click **Add**. If you are unable to identify an ORCID then click Add to enter the Last Name and First Name that you manually input.

Corporate Author – enter an organization or project name

Date of Issue (publication) - It is only necessary to enter the YEAR.

Review Date - Enter the date your document should be reviewed for updates.

Title

Complete this field with the title as given on the title page. Include Volume or Edition in the title field. Any additional title information that is not on the title page should be added with square brackets [ ]

Other Titles

Non-English or shortened or commonly known title, eg. *Guide to best practices for ocean acidification…* is also known under the title *'The OA Bible.'*

Place of Publication

Enter both the city and country eg. Paris, France, unless it is in the USA when city and state abbreviation are entered eg. Silver Spring, MD

Publisher - This can be an organization name or a commercial publisher.

Pages

Where documents are paginated enter the number of pages eg. 239pp.; 23pp. & Appendices

Series/Report No.

Some books and reports are part of a numbered series, enter the full name of the series and enter the number in the separate fields

Identifiers

Use the dropdown to select each of the identifiers for the document and
complete the free text box alongside.   **OBPS will issue a DOI only if one is not identified in this metadata field.**

Resource URL

If your methodology has an official URL; or stores its data or code in a separate Repository, enter the URL or URI in the text box and click **Add**. More URLs can be added if appropriate

Resource URL:

Publisher, organisation, project etc ▾

| Publisher, organisation, project etc |
| Code Repository |
| Dataset |
| Other |

Add

er URL in box.

le):

Contact Name Including ORCID or Email (if available):

In the next field enter the contact details for the author or responsible person for the methodology.

Contact Name Including ORCID or Email (if available):

Name ▾

| Name |
| Email |
| ORCID |

Add

e; if not we strongly recommended obtaining an ORCID

For Journal Articles:

Journal Title
Enter the **full** journal title, do not use title abbreviation.

Volume
Enter the Journal volume number as indicated on the article

Issue/Article Number
Enter the issue number of the volume or unique number of journal issue. Some e-journals only use an article number Add this here eg. Article e45690

Page Range
Enter as pp.50-120; or if whole issue pp.1-175 or if the article has only total pages 12pp.

Describe Screen 3 - Abstract and Non-Bibliographic metadata

To increase discovery of your deposit you are strongly advised to complete the Abstract and Subject Keywords metadata fields.

Abstract/s

Enter both the English and original language. Copy and paste into the box and click . Then copy and paste the second language abstract into the second box and click Add. Sometimes the pasted text is not well aligned, but when the record is added it will be formatted. Note check symbols when copy and paste. Italics will not be displayed

Abstract (English):

Enter the abstract of the item. If the full text deposit is in a non-English language, an English abstract must be provided.

Abstract (Other Language):

Enter the abstract of the item, in any other language (if required).

Maturity Level

Select from the dropdown box the Technology Readiness Level most appropriate for the BP. Otherwise leave at N/A.

Maturity Level:

If applicable please note the maturity level/technology readiness level of the methodology. Select one from the dropdown

○ N/A: where maturity level not applicable (DEFAULT)

○ Mature: Methodologies are well demonstrated for a given objective, documented and peer reviewed; methods are commonly used by more than one organization (TRL7-9)

○ Pilot or Demonstrated: Methodologies are being demonstrated and validated; limited consensus exists on widespread use or in any given situation (TRL 4-6)

○ Concept: A methodology is being developed at one institution(s) but has not been agreed to by the community; requirements and form for a methodology are understood (TRL 1-3)

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Spatial Coverage

May not be appropriate for most BP. Choose the IHB region from the URL https://www.nodc.gov/worlddatacenter/regions/html   and /or free text to describe the region

Sustainable Development Goals (SDG)

Click the SDG Goals .. tab and select individually all the SDG indicator down to the Indicator level eg. 14.2.1 if possible but it is necessary to select the Goal AND target. Click **Add** after each SDG selection

Sustainable Development Goals (SDG):

	Add

Click the 'SDG Goals, Targets, Indicators' button below to select appropriate SDG Goals, Targets and Indicators. Expand the display by clicking on the folder icon to see all Goals, Targets and Indicators for each SDG.

SDG Goals, Targets, Indicators

Essential Ocean Variables (EOV):

If your submission was developed to be compatible with the GOOS EOV (following relevant specifications) please enter all applicable. Enter individually and click Add. Refer to this page for more information https://www.goosocean.org/index.php?option=com_content&view=article&id=170&Itemid=114. Enter N/A if not applicable.

	Add

Essential Biodiversity Variables (EBV):

If your submission was developed to be compatible with the EBV (following the relevant specifications), please enter all applicable . Enter individually and click Add. Refer to this page for more information: https://geobon.org/ebvs/what-are-ebvs/. Enter N/A if not applicable

	Add

Essential Climate Variables (ECV):

If your submission was developed to be compatible with ECV (following the relevant specifications), Copy and paste standard variable names (e.g for atmospheric variables not already under EOVs) . Enter individually and click Add. Refer to this page for more information: https://gcos.wmo.int/en/essential-climate-variables/table. Enter N/A if not applicable

	Add

Essential Ocean Variables

Enter individually (copy and paste) each appropriate EOV from the URL http://www.goosocean.org/eov and click **Add.**

Essential Biodiversity Variables

Enter individually (copy and paste) each appropriate EBV from the URL https://geobon.org/ebvs/what-are-ebvs/ and click **Add**

Essential Climate Variables

Enter individually)copy and paste) each appropriate ECV from the URL and click **Add**

Other Variables

Enter individually with free text and click Add any other relevant variables not already covered.

Sensors

If applicable enter type of sensor and manufacturer if mentioned in the document

Subject: Parameter Discipline

-

Subject: Data Management Practices

-

Subject: Instrument Type

> For these three fields, the SeaDataNet vocabulary has been loaded into OceanBestPractices, to permit selection of predetermined terms.
> Click the keyword and phrases tab under each field and the selection will display; click each term individually and Click Add, to add more terms click keyword and phrases tab again.
> Each main category can be expanded by clicking the icon alongside the category
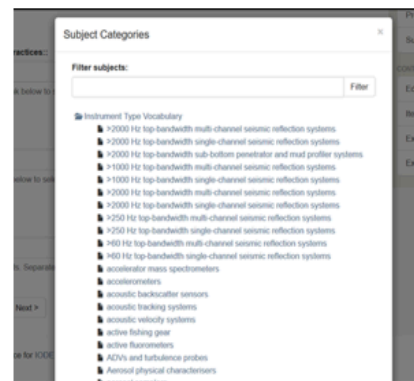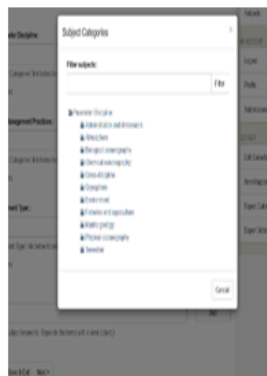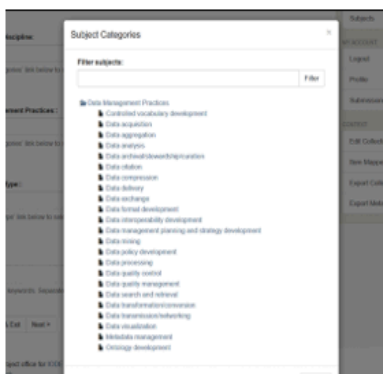
Subject: Other

Provides a metadata field for the input of any uncontrolled retrieval terms (not covered by the vocabularies). Input each term or phrases individually and click **Add** Start each term or phrase with a capital letter e.g Marine spatial planning

Additional Information

Enter any important notes or information that is not included in the metadata

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Publication Status
Select from the dropdown

Publication Status:

Published	⌄

| Published |
| Submitted |
| In Press |
| Unpublished |

Current Status
Select from the dropdown

Current Status:

Current	⌄

| Current |
| Emerging |
| Superseded |
| Obsolete |

Refereed Status
Select from the dropdown box whether your deposit has been peer reviewed (Refereed or Non-Refereed)

Citation
Enter the citation for the item you are depositing, in the normal format as used for reports (or journal articles)
Report example: Author/s (year) Title. Place of Publication, Publisher, Pages, (Series Document ID). DOI:
Journal example: Author/s (year) Title. Journal title in full, Vol, pp. DOI:

Funders
If your document has been produced under a research grant or sponsorship add the information in free text eg. European Union, H2020 Programme

Article submitted to RT
Relates **only** to journal articles that have been submitted to *Frontiers in Marine Science Research Topic Best Practices in Ocean Observing*

Upload File

- Next, you will **Upload** your digital file (most commonly a pdf). Every record (except Document Type Web-based Content) **MUST have a full text file uploaded.**
- Use the Browse button to find the file on your computer (unfortunately you cannot upload directly from a URL yet), then click on Next (or **Upload file OR add another** if you have more than one file to upload).
- Use the File Description box to indicate differences between the files, i.e. whether it is the primary one, and also in File Description enter text if you need to identify something special about the file. Eg. pp. 1-50 only. otherwise enter the format eg. PDF
- Note thumbnails can only be generated by the system from pdf or jpeg files uploaded.

When the file is uploaded the screen will display the file details and you have the opportunity to provide additional file information by clicking on Edit.

Complete any additional information you want to add then Click on **Save** which will take you back to the Upload File screen.   Click **Next**

CC License Screen

License Your Work (Rights Management)

This screen enables you to select which user permissions/license apply to this deposit.

If you select the **Creative Commons** option the following screen will appear and you can then select which of the use permissions apply to your deposit and the correct CC license will be added to the metadata. eg. CC-BY = Allow commercial use of your work YES; Allow modifications to your work YES.   Click **Next** when completed

Deposit Agreement

The final step is to click on the **I Acknowledge this Agreement** check box. In doing this you confirm that what is submitted is not in copyright violation, that non-exclusive rights are given to the OceanBestPractices Repository for internet distribution for non-commercial educational use only and that necessary format changes can be made for preservation of the digital package.

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Click **Next**

Review Submission Screen

You are given the opportunity to review and correct any metadata on this screen.   Click Correct one of these to edit the metadata within that section and it will take you back to the form fill screen.

When you are satisfied with the metadata click **Complete Submission.**

Congratulations!!

You can now Start a new submission or Logout.

An email will now be sent to the Editor of your Collection, who will review the record and either Approve it and the record will appear in the live repository and display in Recent Additions or Reject it with notification to you for the reason – the record will appear back in your Workspace.

As soon as your item is approved by one of the editors, it will be moved into the active repository and you will be notified by email.   We aim for a maximum 48 hours turn-round time.

Contact   info@oceanbestpractices.org   if you do not receive any notification concerning your deposit within 4 days.

Feedback on the OceanBestPractices Repository is welcome, please use the **Send Feedback** facility displayed at the bottom of each page.

There is also a Help facility.

Information and Contacts

Any correspondence concerning OceanBestPractices should be sent to info@oceanbestpractices.org

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Some common problems from Depositors Metadata fields all have a HELP text under the field indicating how the metadata should be input – the input format should be followed.	
Authors - Incomplete list of authors or in wrong order	*Enter all authors in correct order*
Title all in capital letters	*Use upper and lower case.*
Title not finished with a full stop.	*Enter the full stop*
Pages entered without pp. or just p.	*Enter e.g. 53pp.*
Page range entered without pp. in front	*Enter pp. e.g. pp.9-13*

Missing data e.g. publication date, pagination , place of publication, publisher etc.	*Open PDF and find and enter missing metadata OR* *Try to obtain more metadata information from the internet*
Editor **and** Personal author fields completed for creator	*If both appear check file and in preference use Personal Author/s and delete Editors*
Organization entered as corporate author when it is only the authors parent organization	*Delete the organization from the Corporate author field.*
Full text file (pdf preferred) not uploaded	*No record will be accepted without a full text file uploaded (except Web-based Content)*
Uploaded PDF file unable to be opened or bad quality	*Record will be returned to depositor*
DOI initials entered into the metadata field e.g. doi: 1xxxx.	*Enter only the number in the DOI field eg. 10. xxxx*
Format of journal title, publisher, punctuation at variance with previous input	*Endeavour to maintain uniformity of format for items from the same publication or series*
Abbreviated Journal title entered	*Enter the full journal title*
Subject/Uncontrolled Keyword terms entered as a string	*Enter each term or phrase individually*

	*and click **Add** after each one*
[end]	