

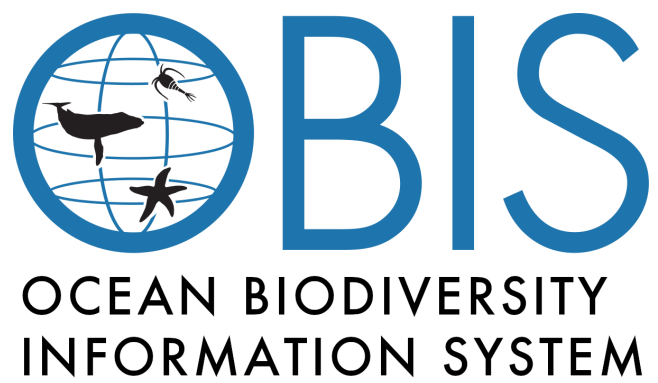
The OBIS manual

02 March, 2023

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Chapter 1

Introduction

This manual provides an overview on how to contribute data to OBIS and how to access data from OBIS. It provides guidelines for OBIS nodes and data providers on the OBIS standards and data management best practices to ensure that data published via OBIS are of high quality and follows internationally recognised standards. It also provides guidelines for data users on how to access, process and visualize data from OBIS.

The OBIS manual is a dynamic document and is revised on a regular basis. Suggestions for additions and changes to this document are welcome and can be sent to the OBIS Capacity Development Task Team by email to training@obis.org or added as issues at <https://github.com/iobis/manual/issues>.

1.1 Guidelines on the sharing and use of data in OBIS

It is important that our data providers as well as all the data users are aware and agree on the [OBIS guidelines on the sharing and use of data in OBIS](#), which was adopted at the [4th OBIS Steering Group](#).

1.2 Acknowledgements

This manual received contributions from: [Leen Vandepitte](#), [Mary Kennedy](#), [Philip Goldstein](#), [Pieter Provoost](#), [Samuel Bosch](#) and [Ward Appeltans](#).

1.3 Data Policy

1.3.1 Guidelines on the sharing and use of data in OBIS

Adopted at SG-OBIS-IV (Feb 2015) and IODE-XXIII (March 2015).

The OBIS data policy is based on the principles of timely, free and unrestricted access to biodiversity data for the benefit of science and society, as defined in the:

- [IOC data exchange policy](#)
- [IOC guidelines on transfer of marine technology](#)
- [IODE objectives](#)
- [OBIS vision and mission](#)

Unless data are collected through activities funded by IOC/IODE, neither UNESCO, IOC, IODE, the OBIS Secretariat, nor its employees or contractors, own the data in OBIS and they take no responsibility for the quality of data or products based on OBIS, or the use or misuse that people may make of them nor can it

control or limit the use of any data or products accessible through its website, other than through the use of a published Data Sharing and Use Terms and Conditions.

1.3.1.1 Data sharing agreement

The data providers retain all rights and responsibilities associated with the data they make available to OBIS via the OBIS nodes. The OBIS nodes warrant that they have made the necessary agreements with the original data providers that it can make the data available to OBIS data under the following Creative Commons licenses:

- [CC-0](#)
- [CC-BY](#)
- [CC-BY-NC](#)

[CC-0](#) is the preferred one and [CC-BY-NC](#) the least preferred.

The data providers are responsible for the completeness of the data and metadata profiles. When data is made available to OBIS, OBIS is granted permission to:

- Distribute the data via its data and information portal
- Build an integrated database, use the data for data quality control purposes, complement the data with other data such as climate variables and build value-added information products and services for science and decision-making
- Serve the data to other similar open-access networks such as GBIF in compliance with the terms and conditions for use set by the data providers.

In pursuance of copyright compliance, OBIS endeavours to secure permission from rights holders to ingest their datasets. In the event that the inclusion of a dataset in OBIS is challenged on the basis of copyright infringement, OBIS will follow a take-down policy until there is resolution.

1.3.1.2 Data use agreement

The data in OBIS are freely available to everyone, following the principles of equitable access and benefit sharing and supporting capacity development and participation of all IOC Member States in global programmes. However, data users are expected to give attribution to the data providers (see Citations) and the use of data from OBIS should happen in the light of fair use, i.e.:

- Recognize that the OBIS portal holds the master copy of the integrated database and hence users should refrain from online redistribution of the OBIS database. Because the OBIS database is updated regularly (every so months) with new datasets and revisions of existing datasets, copies of the OBIS database will become out of date quickly. If you wish to build access web services on top of OBIS, please contact the [OBIS secretariat](#).
- Respect the data providers, and provide helpful feedback on data quality.
- In the case you are a custodian of biogeographic data yourself you should take action to also publish these data through OBIS.
- Consider sponsoring or partnering with OBIS and its OBIS nodes in grant proposal writing. Creating a global database like OBIS cannot happen without the, often voluntary, contribution of many scientists and data managers all over the world. Several activities, such as the coordination, data aggregation, quality control, database and website maintenance require resources including manpower at national and international level. A list of sponsors can be found [here](#)

1.3.1.3 Disclaimer

Appropriate caution is necessary in the interpretation of results derived from OBIS. Users must recognize that the analysis and interpretation of data require background knowledge and expertise about marine biodiversity (including ecosystems and taxonomy). Users should be aware of possible errors, including in the use of species names, geo-referencing, data handling, and mapping. They should crosscheck their results for possible errors, and qualify their interpretation of any results accordingly.

Unless data are collected through activities funded by IOC/IODE, neither UNESCO, IOC, IODE, the OBIS Secretariat, nor its employees or contractors, own the data in OBIS and they take no responsibility for the quality of data or products based on OBIS, or the use or misuse.

1.4 Getting Help in OBIS

If you require additional assistance with OBIS we recommend you first get in touch with the most **relevant OBIS node**. We also have a **support channel** on **Slack** where you can communicate with the OBIS community for help. Please feel comfortable posting to this channel before reaching out to the OBIS Secretariat (helpdesk@obis.org). The OBIS community is quite active on Slack so you are more likely to receive a quick answer to your question by posting there, as the Secretariat receives many requests.

Finally, you can submit an issue on relevant Github repositories:

- **OBIS Manual**
- **OBIS Website**
- **OBIS issues GitHub repo**
- **All other OBIS repositories**

Chapter 2

How to contribute data to OBIS

Since 2000, OBIS has accepted, curated and published marine biodiversity data obtained by varied sources and methods. There is a common misconception that OBIS only accepts species occurrence data - however this is not true! OBIS can accept many types of marine data including:

- Presence/Absence
- Abundance, individual count
- Biomass
- Abiotic measurements
- Biotic measurements
- Sampling methods
- Sample processing methods
- Genetic data including sequences
- Data originating from [historical records](#)
- Tracking data
- Habitat data
- Acoustic data
- Imaging data
- Metadata describing the dataset and any project or programme related metadata

So if you have any of these types of marine data linked to your occurrence data and also want to contribute to OBIS - great! OBIS accepts data from any organization, consortium, project or individual who wants to contribute data. OBIS Data Sources are the authors, editors, and/or organisations that have published one or more datasets through OBIS. They remain the owners or custodians of the data, not OBIS!

OBIS harvests and publishes data from recognized IPTs from OBIS nodes or GBIF publishers. If you own data or have the right to publish data in OBIS, you can contact the [OBIS secretariat or one of the OBIS nodes](#), or additionally a [GBIF publisher](#). Your organization or programme can also [become an OBIS node](#). An OBIS node usually publishes data from multiple data holders, effectively being a node in a network of data providers. So you may have to first find a [relevant node](#) before you get your data ready to publish.

To publish a dataset to OBIS, there are **five** main steps you must go through.

1. First, you must [identify](#) which OBIS node is best suited to host your published data. If you would like to [publish to GBIF](#) at the same time, that is also possible. If your organization is already affiliated with a GBIF node with which you must publish from, OBIS can also [harvest from GBIF nodes](#).
2. Second, you must determine the [structure](#) of your data and which format will best suit your dataset. OBIS follows Darwin Core Archive (DwC-A) standards for datasets, and currently follows a star schema format. This format is based on relational databases. If you are unfamiliar with such database structures, or would like to refamiliarize yourself with them, please read [here](#)

3. Then, you need to actually **format** your data according to OBIS and DwC-A standards and guidelines
4. Once formatted, you should run a series of **quality control** measures to ensure you are not missing any required information and that all standards are being met. This helps ensure all data published in OBIS is formatted in a standardized way. When published in OBIS, OBIS provides a quality report to inform data owners and users of any quality control issues. By completing quality control before you publish your dataset you ensure there are fewer errors to fix later. [LINK TO TIPS FOR QC?]
5. Now that your dataset is ready for publishing, the relevant metadata must be filled in, and then published on the previously identified IPT[link to IPT topic section].

Each of these steps are covered in detail in the relevant sections of the manual. For an overview of this process see **data management flow in OBIS**.

2.1 Why publish data to OBIS?

It is important to publish and ensure your dataset follows a universal standard for several reasons. The **FAIR guiding principles** for scientific data management and stewardship provide a good framework to understand the reasoning behind publishing data. FAIR stands for Findable, Accessible, Interoperable, and Reusable. Let's understand each aspect within the FAIR framework and how it is linked to publishing data in OBIS.

- F - Findable

Even if you publish your dataset on its own, publishing your data with OBIS will make your data more Findable (and Accessible) to a wider audience you might not have otherwise reached. By publishing your dataset to OBIS you are adding to a global database where your data can be found and analyzed alongside thousands of other datasets. For example, a dataset on **marine invasive species in Venezuela** was published July 20, 2022 and as of October 5, 2022 records of this dataset were included in 1,873 data download requests. This can save you time rather than handling individual data requests.

- A - Accessible

Similar to being Findable, OBIS makes your datasets more Accessible. Each dataset is given an identifier when you upload it on an IPT. Thus when users obtain data from OBIS, the original dataset can easily be identified and accessed. Data from OBIS is accessible in numerous ways[LINK to access section], giving data users multiple avenues to potentially access your data.

- I - Interoperable

Using a standardized data format with controlled vocabularies will ensure your data are more Interoperable - more easily interpreted and processed by computers and humans alike. Increasingly, scientists use computer programs to conduct e-Science and collect data with algorithms. Formatting your data for OBIS will ensure it can be read and accessed by such programs as well as understood by users.

- R - Reusable

Publishing your data allows it to be Reused according to your chosen **data usage license**. Very likely you expended resources to collect your data and it would be a waste of those resources to leave your unique data unpublished and inaccessible for current and future generations. Likewise, it is better to preserve any data processing done to ensure your dataset is reproducible and/or verifiable. Finally, data in OBIS is often used in several assessment processes and used as information to support policy makers around the globe making informed decisions.

There are many other benefits of publishing in OBIS, even if you haven't published any work on it yet. This includes:

- Your dataset can be **associated with a DOI**, allowing for your dataset to be more easily cited. By ensuring your dataset citation is complete you will ensure you are being cited properly.
- Publishing your dataset with OBIS makes it easier to set it up as a **Data paper**, which generates value for you and other researchers.

- There are social benefits to data publishing as your work becomes integrated into a wider dataset. It gives both you and your data more visibility. This can lead to more opportunities for collaboration and further career development as a researcher or professional.
- Your data can be incorporated into larger analyses to better understand global ocean biodiversity, helping to shape regional and international policies.

2.2 How to handle sensitive data

We recognize that sometimes your dataset may contain sensitive information (e.g., location data on endangered or poached species), or perhaps your organization does not want certain details publicly accessible. Types of sensitive data include:

- Location data on endangered or protected species
- Information regarding a commonly poached species
- Species or locations that have an economic impact (positive or negative)

To accommodate sensitivity but still be able to contribute to OBIS, we suggest:

- **Generalizing location** information by: Obtaining regional coordinates using **MarineRegions**, **Getty Thesaurus of Geographic Names**, or **Google Maps**
- Using the **OBIS Map tool** to generate a polygon area with a Well-Known Text (WKT) representation of the geometry to paste into the **footprintWKT** field. **Maptool tutorial** Delay timing of publication (e.g., to accommodate mobile species)
- **Submit your dataset, but mark it as private in the IPT** so it is not published right away (i.e., until you set it as public). Alternatively, you can set a password on your dataset in order to share with specific individuals. Note that setting passwords will require some coordination with the IPT manager. By submitting your data to an IPT but not immediately publishing it, you can ensure that the dataset will be in a place to be incorporated at a later date when it is ready to be made public. This not only saves time and helps retain details while relatively fresh in your mind, but also ensures the dataset is still ready to be mobilized in case jobs are changed at a later date.

GBIF has created the following **Best Practices for Generalizing Sensitive data** which can provide you with additional guidance. Chapman AD (2020) Current Best Practices for Generalizing Sensitive Species Occurrence Data. Copenhagen: GBIF Secretariat. <https://doi.org/10.15468/doc-5jp4-5g10>.

2.3 OBIS Data Life Cycle

The basic data life cycle for contributions to OBIS can be broken down into six step-by-step phases:

1. Data structure
2. Data formatting
3. Quality control
4. Publishing
5. Data access (downloading)
6. Data visualization

Each of these phases are outlined in this manual and are composed of a number of steps which are covered in the relevant sections.

After you have decided on your **data structure** and have moved to the Data Formatting stage, you must first **match** the taxa in your dataset to a registered list. In formatting your dataset you will ensure the **required OBIS terms** and **identifiers** are mapped correctly to your data fields and records.

Depending on your data structure, you will then format data into a **DwC-A** format with the appropriate Core table (**Event** or **Occurrence**)) with any applicable extension tables. Any biotic or abiotic measurements will

be moved into the [extendedMeasurementOrFact table](#). Before proceeding to the [publishing](#) stage, there are a number of [quality control](#) steps to complete.

Once your data has been published, you and others can [access](#) datasets through various avenues and it becomes part of OBIS' global database!

This may seem like a daunting process at first glance, but this manual will walk you through each step, and the OBIS community is full of [helpful resources](#). Throughout the manual you will find tutorials and tools to guide you from start to finish through the OBIS data life cycle.

2.3.0.1 Who is responsible for each phase?

Phases 1 through 3 are the responsibilities of the data provider, while Phases 3 and 4 are shared between the data provider and the node manager. Data users are involved in Phases 5 and 6.

The OBIS Secretariat is responsible for data processing and harvesting published resources.

2.4 Biodiversity data standards

From the very beginning, OBIS has championed the use of international standards for biogeographic data. Without agreement on the application of standards and protocols, OBIS would not have been able to build a large central database. OBIS uses the following standards:

- [Darwin Core](#)
- [Ecological Metadata Language](#)
- [Darwin Core Archive and dataset structure](#)

The following pages of this manual review each of these in turn. We show you how to apply these standards to format your data in the [Data Formatting](#) section.

We also provide some [dataset examples](#) for your reference.

2.4.1 Darwin Core

Contents

- [Introduction to Darwin Core](#)
- [Darwin Core terms](#)
- [Darwin Core guidelines](#)
 - [Taxonomy and identification](#)
 - [Occurrence](#)
 - [Record level terms](#)
 - [Location](#)
 - [Event](#)
 - [Time](#)
 - [Sampling](#)

2.4.1.1 Introduction to Darwin Core

[Darwin Core](#) is a body of standards (i.e., identifiers, labels, definitions) that facilitate sharing biodiversity informatics. It provides stable [terms](#) and vocabularies related to biological objects/data and their collection.

Darwin Core is maintained by [TDWG (Biodiversity Information Standards, formerly The International Working Group on Taxonomic Databases)](<http://tdwg.org/>). Stable terms and vocabularies are important for ensuring the datasets in OBIS have consistently interpretable fields. By following Darwin Core standards, both data providers and users can be certain of the definition and quality of data.

2.4.1.1.1 History of Darwin Core and OBIS The old **OBIS schema** was an **OBIS extension** to Darwin Core 1.2., which was based on **Simple Darwin Core**, a subset of Darwin Core which does not allow any structure beyond rows and columns. This old schema added some terms which were important for OBIS, but were not supported by Darwin Core at the time (e.g., start and end date and start and end latitude and longitude, depth range, lifestage, and terms for abundance, biomass and sample size).

In 2009, the Executive Committee of TDWG announced their ratification of an updated version of Darwin Core as a **TDWG Standard**. Ratified Darwin Core unifies specializations and innovations emerging from diverse communities, and provides guidelines for ongoing enhancement. The **Darwin Core Quick Reference Guide** links to TDWG's term definitions and related practices for Ratified Darwin Core. We will discuss the relevance of terms in this guide further below.

In December 2013, the **3rd session of the IODE Steering Group for OBIS** agreed to transition OBIS globally to the TDWG-Ratified version of Darwin Core, and the mapping of the (old) OBIS specific terms to Darwin Core can be found [here](#).

2.4.1.2 Darwin Core (DwC) terms

DwC terms correspond to the column names of your dataset and can be grouped according to class type for convenience, e.g., Taxa, Occurrence, Record, Location, etc. It is important to use DwC field names because only columns using Darwin Core terms as headers will be recognized.

A list of all possible Darwin Core terms can be found on **TDWG**. However, OBIS does not parse all terms (note this doesn't mean you cannot include them, they just will not be parsed when you publish to OBIS). Below is an overview of the most relevant Darwin Core terms to consider when contributing to OBIS, with guidelines regarding their use. We have also compiled a convenient **checklist** of OBIS-accepted terms, their DwC class type, and which OBIS file (Event Core, Occurrence, eMoF, etc.) it is likely to be found in.

Note that OBIS currently has eight required DwC terms: `occurrenceID`, `eventDate`, `decimalLongitude`, `decimalLatitude`, `scientificName`, `scientificNameID`, `occurrenceStatus`, `basisOfRecord`.

The following DwC terms are related to the Class *Taxon*:

- `scientificName`
- `scientificNameID`
- `scientificNameAuthorship`
- `kingdom`
- `taxonRank`
- `taxonRemarks`

The following DwC terms are related to the Class *Identification*:

- `identifiedBy`
- `dateIdentified`
- `identificationReferences`
- `identificationRemarks`
- `identificationQualifier`
- `typeStatus`

The following DwC terms are related to the Class *Occurrence*:

- `occurrenceID`
- `occurrenceStatus`

- recordedBy
- individualCount (OBIS recommends to add measurements to eMoF)
- organismQuantity (OBIS recommends to add measurements to eMoF)
- organismQuantityType (OBIS recommends to add measurements to eMoF)
- sex (OBIS recommends to add measurements to eMoF)
- lifeStage (OBIS recommends to add measurements to eMoF)
- behavior
- associatedTaxa
- occurrenceRemarks
- associatedMedia
- associatedReferences
- associatedSequences
- catalogNumber
- preparations

The following DwC terms are related to the Class *Record* level:

- basisOfRecord
- institutionCode
- collectionCode
- collectionID
- bibliographicCitation
- modified
- dataGeneralizations

The following DwC terms are related to the Class *Location*:

- decimalLatitude
- decimalLongitude
- coordinateUncertaintyInMeters
- geodeticDatum
- footprintWKT
- minimumDepthInMeters
- maximumDepthInMeters
- locality
- waterBody
- islandGroup
- island
- country
- locationAccordingTo
- locationRemarks
- locationID

The following DwC terms are related to the Class *Event*:

- parentEventID
- eventID
- eventDate
- type
- habitat
- samplingProtocol (OBIS recommends to add sampling facts to eMoF)
- sampleSizeValue (OBIS recommends to add sampling facts to eMoF)
- SampleSizeUnit (OBIS recommends to add sampling facts to eMoF)
- samplingEffort (OBIS recommends to add sampling facts to eMoF)

The following DwC terms are related to the Class *MaterialSample*:

- materialSampleID

2.4.1.3 Darwin Core guidelines

2.4.1.3.1 Taxonomy and identification `scientificName` (required term) should always contain the originally recorded scientific name, even if the name is currently a synonym. This is necessary to be able to track back records to the original dataset. The name should be at the lowest possible taxonomic rank, preferably at species level or lower, but higher ranks, such as genus, family, order, class etc are also acceptable. We recommend to not include authorship in `scientificName`, and only use `scientificNameAuthorship` for that purpose. The `scientificName` term should only contain the name and not identification qualifications (such as *?*, *confer* or *affinity*), which should instead be supplied in the `IdentificationQualifier` term, see examples below. `taxonRemarks` can capture comments or notes about the taxon or name.

A **WoRMS** LSID should be added in `scientificNameID` (required term), OBIS will use this identifier to pull the taxonomic information from the World Register of Marine Species (WoRMS) into OBIS, such as the taxonomic classification and the accepted name in case of invalid names or synonyms. LSIDs are persistent, location-independent, resource identifiers for uniquely naming biologically significant resources. More information on LSIDs can be found at www.lsid.info. For example, the WoRMS LSID for *Solea solea* is: `urn:lsid:marinespecies.org:taxname:127160`, and can be found at the bottom of each WoRMS taxon page, e.g. *Solea solea*.

`kingdom` and `taxonRank` can help us in identifying the provided `scientificName` in case the name is not available in WoRMS. `kingdom` in particular can help us find alternative genus-species combinations and avoids linking the name to homonyms. Please contact the WoRMS data management team (info@marinespecies.org) in case the `scientificName` is missing in WoRMS. `kingdom` and `taxonRank` are not necessary when a correct `scientificNameID` is provided.

OBIS recommends providing information about how an identification was made, for example by which ID key, species guide or expert; and by which method (e.g morphology vs. genomics), etc. The person's name who made the taxonomic identification can go in `identifiedBy` and *when* in `dateIdentified`. Use the ISO 8601:2004(E) standard for date and time, for instructions see **Time**. A list of references, such as field guides used for the identification can be listed in `identificationReferences`. Any other information, such as identification methods, can be added to `identificationRemarks`.

Examples:

| <code>scientificNameID</code> | <code>scientificName</code> | <code>kingdom</code> | <code>phylum</code> | <code>class</code> | |
|--|------------------------------|----------------------|---------------------|--------------------|--|
| <code>urn:lsid:marinespecies.org:taxname:142004</code> | <i>Yoldiella nana</i> | Animalia | Mollusca | Bivalvia | |
| <code>urn:lsid:marinespecies.org:taxname:140584</code> | <i>Ennucula tenuis</i> | Animalia | Mollusca | Bivalvia | |
| <code>urn:lsid:marinespecies.org:taxname:131573</code> | <i>Terebellides stroemii</i> | Animalia | Annelida | Polychaeta | |

| <code>order</code> | <code>family</code> | <code>genus</code> | <code>specificEpithet</code> | <code>scientificNameAuthorship</code> | |
|--------------------|---------------------|--------------------|------------------------------|---------------------------------------|--|
| Nuculanoida | Yoldiidae | Yoldiella | nana | (Sars M., 1865) | |
| Nuculoida | Nuculidae | Ennucula | tenuis | (Montagu, 1808) | |
| Terebellida | Trichobranchidae | Terebellides | stroemii | Sars, 1835 | |

Data from *Benthic fauna around Franz Josef Land*.

If the record represents a nomenclatural type specimen, the term `typeStatus` can be used, e.g. for holotype, syntype, etc.

In case of uncertain identifications, and the scientific name contains qualifiers such as *cf.*, *?* or *aff.*, then this name should go in `identificationQualifier`, and `scientificName` should contain the name of the lowest possible taxon rank that refers to the most accurate identification. E.g. if the specimen was accurately identified down to genus level, but not species level, then the `scientificName` should contain the name of the genus, the `scientificNameID` should contain the LSID the genus and the `identificationQualifier` should contain the uncertain species name combined with *?* or other qualifiers. The table below shows a few examples:

The use and definitions for additional NO signs (`identificationQualifier`) can be found in **Open Nomenclature**

in the biodiversity era, which provides examples for using the main Open Nomenclature qualifiers associated with *physical specimens*. The publication [Recommendations for the Standardisation of Open Taxonomic Nomenclature for Image-Based Identifications](#) provides examples and definitions for identificationQualifiers for *non-physical specimens (image-based)*.

Examples:

| scientificName | scientificNameAuthorship | scientificNameID | taxonRank | identificationQualifier |
|-----------------------|--|--|-----------|---------------------------|
| Pelagia | Péron & Lesueur, 1810 | urn:lsid:marinespecies.org:taxname:135262 | genus | gen. nov. |
| Pelagia benovici | Piraino, Aglieri, Scorrano & Boero, 2014 | urn:lsid:marinespecies.org:taxname:851656 | species | sp. nov. |
| Gadus | Linnaeus, 1758 | urn:lsid:marinespecies.org:taxname:125732 | genus | cf. morhua |
| Polycera | Cuvier, 1816 | urn:lsid:marinespecies.org:taxname:138369 | genus | cf. hedgpethi |
| Tubifex | Lamarck, 1816 | urn:lsid:marinespecies.org:taxname:137392 | genus | ? |
| Tubifex | Lamarck, 1816 | urn:lsid:marinespecies.org:taxname:137392 | genus | sp. inc. |
| Brisinga | Asbjørnsen, 1856 | urn:lsid:marinespecies.org:taxname:123210 | genus | gen. inc. |
| Uroptychus compressus | Baba & Wicksten, 2019 | urn:lsid:marinespecies.org:taxname:1332465 | genus | sp. inc. |
| Eurythenes | S. I. Smith in Scudder, 1882 | urn:lsid:marinespecies.org:taxname:101607 | genus | sp. DISCOLL.PAP.JC165.674 |
| Paroriza | Hérourard, 1902 | urn:lsid:marinespecies.org:taxname:123467 | genus | sp.[unique123]aff.pallens |
| Aristeidae | Wood-Mason in Wood-Mason & Alcock, 1891 | urn:lsid:marinespecies.org:taxname:106725 | family | stet. |
| Nematocarcinus | Milne-Edwards, 1881 | urn:lsid:marinespecies.org:taxname:107015 | genus | sp.indet. |
| Brisinga | Asbjørnsen, 1856 | urn:lsid:marinespecies.org:taxname:123210 | genus | gen.inc. |
| Brisinga costata | Verrill, 1884 | urn:lsid:marinespecies.org:taxname:17825 | species | sp.inc. |

2.4.1.3.2 Occurrence `occurrenceID` (required term) is an identifier for the occurrence record and should be persistent and globally unique. If the dataset does not yet contain (globally unique) `occurrenceIDs`, then they should be created. There are no guidelines yet on designing the persistence of this ID, the level of uniqueness (from dataset to global) and the precise algorithm and format for generating the ID, but in the absence of a persistent globally unique identifier, one could be constructed by combining the `institutionCode`, the `collectionCode` and the `catalogNumber` (or `autonumber` in the absence of a `catalogNumber`), see further below. Note that the inclusion of `occurrenceID` is also necessary for datasets in the **OBIS-ENV-DATA** format.

`occurrenceStatus` (required term) is a statement about the presence or absence of a taxon at a location. It is an important term, because it allows us to distinguish between presence and absence records. It is a required term and should be filled in with either **present** or **absent**.

A few terms related to quantity: `organismQuantity` and `organismQuantityType`, have been added to the TDWG ratified Darwin Core. This is a lot more versatile than the older `individualCount` field. However, OBIS recommends to use the **Extended MeasurementOrFact extension** for quantitative measurements because of the standardization of terms and the fact that you can link these measurements to sampling events and factual sampling information.

Please take note that OBIS recommends all quantitative measurements and sampling facts to be treated in the **ExtendedMeasurementOrFact** extension and not in the Darwin Core files.

In the case specimens were collected and stored (e.g. museum collections), the `catalogNumber` and `preparations` terms can be used to provide the identifier for the record in the collection and to document the preparation and preservation methods. The term `typeStatus` see above (under identification) can be used in this context too.

Both `associatedMedia`, `associatedReferences` and `associatedSequences` are global unique identifiers or URIs pointing to respectively associated media (e.g. online image or video), associated literature (e.g. DOIs) or genetic sequence information (e.g. GenBANK ID).

`associatedTaxa` include a list (concatenated and separated) of identifiers or names of taxa and their associations with the Occurrence, e.g. the species occurrence was associated to the presence of kelp such as *Laminaria digitata*.

The recommended vocabulary for `sex` see **BODC vocab : S10**, for `lifeStage` see **BODC vocab: S11**, `behavior` (no vocab available), and `occurrenceRemarks` can hold any comments or notes about the Occurrence.

`recordedBy` can hold a list (concatenated and separated) of names of people, groups, or organizations responsible for recording the original Occurrence. The primary collector or observer, especially one who applies a personal identifier (`recordNumber`), should be listed first.

Example:

| collectionCode | occurrenceID | catalogNumber | occurrenceStatus |
|------------------------------|--------------------------------------|--------------------------------------|------------------|
| SluiceDock_benthic_1976/1981 | SluiceDock_benthic_1976_1 | SluiceDock_benthic_1976_1 | present |
| SluiceDock_benthic_1976/1981 | SluiceDock_benthic_1976_2 | SluiceDock_benthic_1976_2 | present |
| SluiceDock_benthic_1976/1981 | SluiceDock_benthic_1979-07/1980-06_1 | SluiceDock_benthic_1979-07/1980-06_1 | present |

Data from *A summary of benthic studies in the sluice dock of Ostend during 1976-1981*.

2.4.1.3.3 Record level terms `basisOfRecord` (required term) specifies the nature of the record, i.e. whether the occurrence record is based on a stored specimen or an observation. In case the specimen is collected and stored in a collection (e.g. at a museum, university, research institute), the options are `PreservedSpecimen` (e.g. preserved in ethanol, tissue etc.), `FossilSpecimen` (fossil, which allows OBIS to make the distinction between the date of collection and the time period the specimen was assumed alive) or `LivingSpecimen` (an intentionally kept/cultivated living specimen e.g. in an aquarium or culture collection). In case no specimen is deposited, the basis of record is either `HumanObservation` (e.g. bird sighting, benthic sample but specimens were discarded after counting), or `MachineObservation` (e.g. for occurrences based on automated sensors such as DNA sequencers, image recognition etc).

When the `basisOfRecord` is a *preservedSpecimen*, *LivingSpecimen* or *FossilSpecimen* please also add the `institutionCode`, `collectionCode` and `catalogNumber`, which will enable people to visit the collection and re-examine the material. Sometimes, for example in case of living specimens, a dataset can contain records pointing to the origin, the in-situ sampling position as well as a record referring to the ex-situ collection. In this case please add the event type information in `type` (see [OBIS manual: event](#)).

`institutionCode` identifies the custodian institute (often by acronym), `collectionCode` identifies the collection or dataset within that institute. Collections cannot belong to multiple institutes, so all records within a collection should have the same `institutionCode`. The `catalogNumber` is an identifier for the record within the dataset or collection.

As explained before, the `occurrenceID` could for example be constructed by combining the `institutionCode`, `collectionCode` and `catalogNumber`:

Example:

| modified | institutionCode | collectionCode |
|---------------------|-----------------|--------------------------------|
| 2017-02-27 15:47:31 | Ugent | Vegetation_Gazi_Bay(Kenya)1987 |
| 2017-02-27 15:47:31 | Ugent | Vegetation_Gazi_Bay(Kenya)1987 |
| 2017-02-27 15:47:31 | Ugent | Vegetation_Gazi_Bay(Kenya)1987 |

| basisOfRecord | occurrenceID | catalogNumber |
|------------------|---|---|
| HumanObservation | Ugent_Vegetation_Gazi_Bay(Kenya)1987_7553 | Ugent_Vegetation_Gazi_Bay(Kenya)1987_7553 |
| HumanObservation | Ugent_Vegetation_Gazi_Bay(Kenya)1987_7554 | Ugent_Vegetation_Gazi_Bay(Kenya)1987_7554 |
| HumanObservation | Ugent_Vegetation_Gazi_Bay(Kenya)1987_7555 | Ugent_Vegetation_Gazi_Bay(Kenya)1987_7555 |

Data from *Algal community on the pneumatophores of mangrove trees of Gazi Bay in July and August 1987*.

`bibliographicCitation` allows for providing different citations on record level, while a single citation for the entire dataset can and should be provided in the metadata (see [EML](#)). The citation at record level can have the format of a chapter in a book, where the book is the dataset citation. The record citation will have preference over the dataset citation. We do not, however, recommend to create different citations for every record, as this will explode the number of citations and will hamper the re-use of data.

`modified` is the most recent date-time on which the resource was changed. It is required to use the ISO 8601:2004(E) standard, for instructions see [Time](#).

`dataGeneralizations` refers to actions taken to make the shared data less specific or complete than in its original form. Suggests that alternative data of higher quality may be available on request. This can be the case for occurrences of vulnerable or endangered species and there positions are converted to the center of grid cells.

2.4.1.3.4 Location `decimalLatitude` and `decimalLongitude` (required terms) are the geographic latitude and longitude (in decimal degrees), using the spatial reference system given in `geodeticDatum` of the geographic center of a `Location`. The number of decimals should be appropriate for the level of uncertainty in `coordinateUncertaintyInMeters` (at least within an order of magnitude). `coordinateUncertaintyInMeters` is the radius of the smallest circle around the given position containing the whole location. Regarding `decimalLatitude`, positive values are north of the Equator, negative values are south of it. All values lie between -90 and 90, inclusive. Regarding `decimalLongitude`, positive values are east of the Greenwich Meridian, negative values are west of it. All values lie between -180 and 180, inclusive.

In OBIS, the spatial reference system to be documented in `geodeticDatum` is [EPSG:4326](#). Coordinates in degrees/minutes/seconds can be converted to decimal degrees using our [coordinates tool](#). We also provide a [tool](#) to check coordinates or to determine coordinates for a location (point, transect or polygon) on a map. This tool also allows geocoding location names using [marineregions.org](#).

The name of the place or location can be provided in `locality`, and if possible linked by a `locationID` using a persistent ID from a gazetteer, such as the MRGID from [MarineRegions](#). If the species occurrence only contains the name of the `locality`, but not the exact coordinates, we recommend using a geocoding service to obtain the coordinates. [Marine Regions](#) has a [search interface](#) for geographic names, and provides coordinates and often precision in meters, which can go into `coordinateUncertaintyInMeters`. Another option is to use the [Getty Thesaurus of Geographic Names](#) or [Google Maps](#): after looking up a location, the decimal coordinates can be found in the page URL. Additional information about the locality can also be stored in DwC terms such as `waterBody`, `islandGroup`, `island` and `country`. `locationAccordingTo` should provide the name of the gazetteer that is used to obtain the coordinates for the locality.

`locationID` is an identifier for the set of location information (e.g. station ID, or MRGID from [marineregions](#)), for example the [Balearic Plain](#) has MRGID: <http://marineregions.org/mrgid/3956>.

A [Well-Known Text](#) (WKT) representation of the shape of the location can be provided in `footprintWKT`. This is particularly useful for tracks, transects, tows, trawls, habitat extent or when an exact location is not known. WKT strings can be created using our [WKT tool](#). This tool also calculates a midpoint and a radius, which can then be added to `decimalLongitude`, `decimalLatitude`, and `coordinateUncertaintyInMeters` respectively. There is also an [R tool](#) to calculate the centroid and radius for WKT polygons. [wktmap.com](#) can be used to visualize and share WKT strings.

Some examples of WKT strings:

```
LINESTRING (30 10, 10 30, 40 40)
POLYGON ((30 10, 40 40, 20 40, 10 20, 30 10))
MULTILINESTRING ((10 10, 20 20, 10 40),(40 40, 30 30, 40 20, 30 10))
MULTIPOLYGON (((30 20, 45 40, 10 40, 30 20)),((15 5, 40 10, 10 20, 5 10, 15 5)))
```

Keep in mind while filling in `minimumDepthInMeters` and `maximumDepthInMeters` that this should be the depth at which the sample was taken and not the water column depth at that location.

Example:

| <code>decimalLatitude</code> | <code>decimalLongitude</code> | <code>geodeticDatum</code> | <code>coordinateUncertaintyInMeters</code> | <code>footprintWKT</code> | <code>footprintSRS</code> |
|------------------------------|-------------------------------|----------------------------|--|---------------------------------------|---------------------------|
| 38.698 | 20.95 | EPSG:4326 | 75033.17 | LINESTRING (20.31 39.15, 21.58 38.24) | EPSG:4326 |
| 42.72 | 15.228 | EPSG:4326 | 154338.87 | LINESTRING (16.64 41.80, 13.82 43.64) | EPSG:4326 |
| 39.292 | 20.364 | EPSG:4326 | 162083.27 | LINESTRING (19.05 40.34, 21.68 38.25) | EPSG:4326 |

Data from Adriatic and Ionian Sea mega-fauna monitoring employing ferry as platform of observation along the Ancona-Igoumenitsa-Patras lane, from December 2014 to December 2018.

2.4.1.3.5 Event `eventID` is an identifier for the sampling or observation event. `parentEventID` is an identifier for a parent event, which is composed of one or more sub-sampling (child) events (`eventIDs`). `eventID` can be used for replicate samples or sub-samples. Make sure each replicate sample receives a unique event ID, which could be based on the unique sample ID in your dataset (which can also be recorded in

`materialSampleID`). OBIS does not need to have separate `eventIDs` and `materialSampleIDs`, rather OBIS can treat these two terms as equivalent. The unique sample ID for each physical sample or subsample at each location and time is highly recommended information for sample traceability and data provenance. Repeating the `parentEventID` in the child event (use `:` as delimiter) will make the structure of the dataset easier to understand. See also [De Pooter et al. 2017](#) for an example of an event hierarchy in a complex benthos dataset.

`habitat` is a category or description of the habitat in which the Event occurred (e.g. seamount, hydrothermal vent, seagrass, rocky shore, intertidal, ship wreck etc.)

Example:

| eventID | parentEventID | eventDate | eventRemarks |
|---|---|-----------|--------------|
| I0F_benthos_Plominski_zaljev_2000_crs | | | cruise |
| I0F_benthos_Plominski_zaljev_2000_stat1 | I0F_benthos_Plominski_zaljev_2000_crs | 2000-08 | stationVisit |
| I0F_benthos_Plominski_zaljev_2000_stat2 | I0F_benthos_Plominski_zaljev_2000_crs | 2000-08 | stationVisit |
| I0F_benthos_Plominski_zaljev_2000_s01 | I0F_benthos_Plominski_zaljev_2000_stat1 | | sample |
| I0F_benthos_Plominski_zaljev_2000_s02 | I0F_benthos_Plominski_zaljev_2000_stat2 | | sample |

Data from Environmental impact assessments in the eastern part of Adriatic sea - species list of benthic invertebrates and phytobenthos (2000-2010).

2.4.1.3.6 Time The date and time at which an occurrence was recorded goes in `eventDate`. This term uses the [ISO 8601 standard](#). OBIS recommends using the extended ISO 8601 format with hyphens.

ISO 8601 dates can represent moments in time at different resolutions, as well as time intervals, which use `/` as a separator. Date and time are separated by `T`. Times can have a time zone indicator at the end, if this is not the case then the time is assumed to be local time. When a time is UTC, a `Z` is added. Some examples of ISO 8601 dates are:

```
1973-02-28T15:25:00
2005-08-31T12:11+12
1993-01-26T04:39+12/1993-01-26T05:48+12
2008-04-25T09:53
1948-09-13
1993-01/02
1993-01
1993
```

Besides year, month and day numbers, ISO 8601 also supports ordinal dates (year and day number within that year) and week dates (year, week, and day number within that week). These dates are less common and have the formats `YYYY-DDD` (for example 2015-023) and `YYYY-Www-D` (for example 2014-W26-3).

ISO 8601 [durations](#) should not be used.

2.4.1.3.7 Sampling Information on `sampleSizeValue` and `sampleSizeUnit` is very important when an organism quantity is specified. However, with [OBIS-ENV-DATA](#) it was felt that the extended Measurementor-Fact ([eMoF](#)) extension would be better suited than the DwC Event Core to store the sampled area and/or volume because in some cases `sampleSize` by itself may not be detailed enough to allow interpretation of the sample. For instance, in the case of a plankton tow, the volume of water that passed through the net is relevant. In case of Niskin bottles, the volume of sieved water is more relevant than the actual volume in the bottle. In these examples, as well as generally when recording sampling effort for all protocols, eMoF enables greater flexibility to define parameters, as well as the ability to describe the entire sample and treatment protocol through multiple parameters. eMoF also allows you to standardize your terms to a controlled vocabulary.

The next chapter deals with the metadata (description of the dataset) in [Ecological Metadata Language](#).

2.4.2 Darwin Core Archive

Contents

- Darwin Core Archive
- OBIS holds more than just species occurrences: the ENV-DATA approach
 - ExtendedMeasurementOrFact Extension (eMoF)
 - eDNA & DNA derived data Extension
 - A special case: habitat types
- When to use Event Core
- When to use Occurrence Core
- Recommended reading

2.4.2.1 Darwin Core Archive

Darwin Core Archive (DwC-A) is the standard for packaging and publishing biodiversity data using Darwin Core terms. It is the preferred format for publishing data in OBIS and GBIF. The format is described in the [Darwin Core text guide](#). A Darwin Core Archive contains a number of text files, including data tables formatted as CSV.

The conceptual data model of the Darwin Core Archive is a star schema with a single core table, for example containing occurrence records or event records, at the center of the star. Extension tables can optionally be associated with the core table. It is not possible to link extension tables to other extension tables (to form a so-called snowflake schema). There is a one-to-many relationship between the core and extension records, so each core record can have zero or more extension records linked to it, and each extension record must be linked to exactly one core record. Definitions for the core and extension tables can be found [here](#).

Besides data tables, a Darwin Core Archive also contains two XML files: one file which describes the archive and data file structure (`meta.xml`), and one file which contains the dataset's metadata (`eml.xml`).

Figure: structure of a Darwin Core Archive.

2.4.2.2 OBIS holds more than just species occurrences: the ENV-DATA approach

Data collected as part of marine biological research often include measurements of habitat features (such as physical and chemical parameters of the environment), biotic and biometric measurements (such as body size, abundance, biomass), as well as details regarding the nature of the sampling or observation methods, equipment, and sampling effort.

In the past, OBIS relied solely on the [Occurrence Core](#), and additional measurements were added in a structured format (e.g. JSON) in the Darwin Core term `dynamicProperties` inside the occurrence records. This approach had significant downsides: the format is difficult to construct and deconstruct, there is no standardization of terms, and attributes which are shared by multiple records (think sampling methodology) have to be repeated many times. The formatting problem can be addressed by moving measurements to a [MeasurementOrFacts](#) extension table, but that doesn't solve the redundancy and standardization problems.

With the release and adoption of a new core type [Event Core](#) it became possible to associate measurements with nested events (such as cruises, stations, and samples), but the restrictive star schema of Darwin Core archive prohibited associating measurements with the event records in the Event core as well as with the occurrence records in the Occurrence extension. For this reason an extended version of the existing [MeasurementOrFact](#) extension was created.

2.4.2.2.1 ExtendedMeasurementOrFact Extension (eMoF) As part of the IODE pilot project [Expanding OBIS with environmental data OBIS-ENV-DATA](#), OBIS introduced a custom [ExtendedMeasurementOrFact](#) or eMoF extension, which extends the existing [MeasurementOrFact](#) extension with 4 new terms:

- `occurrenceID`

- `measurementTypeID`
- `measurementValueID`
- `measurementUnitID`

The `occurrenceID` term is used to circumvent the limitations of the star schema, and link measurement records in the `ExtendedMeasurementOrFact` extension to occurrence records in the `Occurrence` extension. Note that in order to comply with the Darwin Core Archive standard, these records still need to link to an event record in the `Event` core table as well. Thanks to this term we can now store a variety of measurements and facts linked to either events or occurrences:

- organism quantifications (e.g. counts, abundance, biomass, % live cover, etc.)
- species biometrics (e.g. body length, weight, etc.)
- facts documenting a specimen (e.g. living/dead, behaviour, invasiveness, etc.)
- abiotic measurements (e.g. temperature, salinity, oxygen, sediment grain size, habitat features)
- facts documenting the sampling activity (e.g. sampling device, sampled area, sampled volume, sieve mesh size).

Figure: Overview of an OBIS-ENV-DATA format. Sampling parameters, abiotic measurements, and occurrences are linked to events using the `eventID` (full lines). Biotic measurements are linked to occurrences using the new `occurrenceID` field of the `ExtendedMeasurementOrFact` Extension (dashed lines).

2.4.2.2.2 eDNA & DNA derived data Extension DNA derived data are increasingly being used to document taxon occurrences. To ensure these data are useful to the broadest possible community, GBIF published a guide entitled [Publishing DNA-derived data through biodiversity data platforms](#). This guide is supported by the DNA derived data extension for Darwin Core, which incorporates MIXS terms into the Darwin Core standard. eDNA and DNA derived data is linked to occurrence data with the use of `occurrenceID` and/or `eventID`. Refer to the [Examples: ENV-DATA and DNA derived data](#) for use case examples of eDNA and DNA derived data.

2.4.2.2.3 A special case: habitat types Event Core is perfect for enriching OBIS with interpreted information such as biological community, biotope or habitat type (collectively referred to as ‘habitats’). However, the unconstrained nature of the terms `measurementTypeID`, `measurementValueID`, and `measurementUnitID` leads to a risk that habitats measurements are structured inconsistently within the Darwin Core Archive standard and as a result, are not easily discoverable, understood or usable.

As a result, members of the European Marine Observation and Data Network (EMODnet) Seabed Habitats and Biology thematic groups have produced a document [Duncan et al. \(2021\)](#) that recommends a consistent approach to structuring classified habitat data in Europe using the Darwin Core eMoF Extension. Note that this approach has not yet been discussed or approved at the global level so the implementation at the EurOBIS level may be considered a pilot.

The overarching principles are summarised here. Note that because of the numerous classification systems and priority habitat lists in existence, it is not possible to point to a single vocabulary for populating each of `measurementTypeID`, `measurementValueID` and `measurementUnitID`, as for other measurement types, so below are the *types* of information to include, with an example, as recommended by [Duncan et al. \(2021\)](#):

- `measurementTypeID`: A machine-readable URI or DOI reference describing the (version of the) classification system itself. For example: <https://dd.eionet.europa.eu/vocabulary/biodiversity/eunishabitats/>
- `measurementValueID`: If available, a machine-readable URI describing the habitat class in “measurement-Value”. For example: <https://dd.eionet.europa.eu/vocabulary/biodiversity/eunishabitats/A5.36>
- `measurementUnitID`: null because habitat types are unitless.

Please consult [Duncan et al. \(2021\)](#) for more details, including: - how to handle a single event with multiple habitat measurements - recommended vocabularies and terms for common habitat classification systems - example eMoF table

2.4.2.2.4 Recommended reading

- [De Pooter et al. 2017](#). Toward a new data standard for combined marine biological and environmental datasets - expanding OBIS beyond species occurrences. Biodiversity Data Journal 5: e10989. hdl.handle.net/10.3897/BDJ.5.e10989
- [Duncan et al. \(2021\)](#). A standard approach to structuring classified habitat data using the Darwin Core Extended Measurement or Fact Extension. EMODnet report.

2.4.2.3 Relational databases: the underlying framework of OBIS

If you are not familiar with relational databases, it can be difficult to understand the underlying framework OBIS relies on. This section will help you understand relational databases, how they relate to OBIS, the data you will format for OBIS, and the data you may download from OBIS.

Why do we use relational databases in the first place? You are probably familiar with flat databases which contain all data in one table - this is likely how your own data are formatted. Relational databases instead consist of multiple data tables that each contain *related* information. When all this information is presented in one table, the table becomes larger, very complicated, and the likelihood of data duplication increases. Relational databases seek to simplify complexities and **reduce redundancy** by allowing information to be self-contained, but linked to each other.

You can think of a relational database as separate Excel sheets or data tables that are related to each other. One data table could be a “core” table, whereas others are “extensions”. Sometimes the relationships between core and extension tables are hierarchical, but this is not always the case. There is, however, always a *relationship* linking core and extension tables.

Let’s review core and extension tables and how we use them for OBIS.

Core tables contain information that is applicable to **all** extension tables, and extension tables contain more information about the records within the Core table. Each table, whether core or extension, contains records and attributes. Each row is a record (e.g., a sampling event, a species’ occurrence), whereas each column is an attribute (e.g., a date, a measurement).

Records between tables are linked to each other by the use of *identifiers*. A description of measurements pertaining to a record in an Extension table will have the same identifier as the record it is describing in the Core table. By using identifiers to link records, we reduce data repetition, see [below](#) for examples. In the Darwin Core format that OBIS uses, the core table is either **Event** or **Occurrence**, and datasets can have **one, none, or more** extension tables. Further explanation of data formatting in OBIS is covered in the [Data Formatting section](#) of the OBIS manual.

Let’s review an example to fully understand how relational databases work. We will look at a simple relational database used by a fictional country that tracks student performance in three different courses between three schools. Rather than trying to contain information about each school, course, and student performance in one place, this information is split into three separate tables. We see that the pink table gives us information about each school - its name, and the district it belongs to. Each school also has a schoolID, an identifier linking to the blue table where we can see student performance (course mean) in each course, the class size, and year. You will notice that the course mean and class size are bundled under columns called measurementType and measurementValue. These are part of the DwC standardized vocabularies and are integral to reducing repeated data, especially when one dataset has multiple years. Finally we see that the courseID in the blue table links to the yellow one with the courseID identifier, giving us information about each course.

A fourth table could easily be created to track total school population size through time. In contrast, if this information was presented in the pink Schools in Country table, the school information would be duplicated as you add rows for each year. In this way, you can easily see how useful relational databases are. Of course, this is a simplified example but it demonstrates how related tables can be linked by identifiers to reduce table complexity and data replication.

We elaborate on how this structure is applied within OBIS [here](#).

Figure. An example of how a relational database works. Three tables show the (1) student performance (blue table) in (2) different schools (pink table) in a fictional country, and (3) the names of the courses (yellow table). Information between each table is linked by the use of identifiers, indicated by the arrows.

Note that when OBIS harvests data, datasets are flattened - i.e., all separate data tables are combined into one. This is the kind of file you will receive when you [download data from OBIS](#). The reason for this is that querying relational databases significantly reduces computational time, as opposed to querying a flat database. Relational databases also facilitate requests for subsets that meet particular criteria - e.g., all data from Norway for one species above a certain depth.

2.4.2.4 How to avoid redundancy

Avoiding redundancy and data duplication within your dataset is built into the OBIS data structure. Utilizing the star schema which delineates relationships between the core table and extension tables, we can limit the repetition of data.

For example, let us consider the dates of a ship cruise where a series of bottom trawls were taken. The sampling information (e.g., date range, equipment used, etc.) for each species collected in these trawls is the same. Because of this, we know we are dealing with unique sampling events and thus we will use **Event core**. So, our Event core table will contain all information related to the sampling events (e.g., date, location). Then, information pertaining to each collected species (e.g., abundance, biomass, sampling methods, etc.) will be placed in an extension, the (Extended)MeasurementOrFact table. Here, each measurement for each species and sample will occur on a separate record. These records will be linked to the correct sampling event in the Event core by an identifier - the eventID. If we were to put this data in one file, the fields related to date and location (e.g., eventDate, decimalLongitude, decimalLatitude, etc.) would be repeated for each species.

Let's consider another example. If you took one temperature measurement from the water column where you took your sample, each species found in that sample would have the **same** temperature measurement. By linking such measurements to the *event* instead of each *occurrence*, we are able to reduce the amount of data being repeated.

An advantage of structuring data this way is that if any mistakes are made, you only need to correct it once! So you can see that using relational event structures (when applicable) in combination with extension files can really simplify and reduce the number of times data are repeated.

Caveat: However we would like to note that in some cases, data duplication may occur due to the star schema structure. For example, when publishing DNA-derived data, **Occurrence core will have to be used**, which necessitates the repetition of event data for each occurrence record. A possible solution to avoid duplicating Event data in these cases is to publish Event data as **sibling datasets**. Thus you would have two datasets, linked by the eventID:

- 1 Event core + eMoF
- 1 Occurrence core + DNA-derived data extensions + eMoF

2.4.3 Ecological Metadata Language

OBIS (and GBIF) uses the Ecological Metadata Language (EML) as its metadata standard, which is specifically developed for the earth, environmental and ecological sciences. It is based on prior work done by the Ecological Society of America and associated efforts. EML is implemented as XML. See more information on [EML](#).

OBIS uses the [GBIF EML profile \(version 1.1\)](#). In case data providers use ISO19115/ISO19139, there is a mapping available [here](#).

For OBIS, the following 4 terms are the bare minimum: **Title**, **Citation**, **Contact** and **Abstract**. Below is an overview of all the EML terms used to describe datasets:

- **title** [xml:lang="..."]: A good descriptive title is indispensable and can provide the user with valuable information, making the discovery of data easier. Multiple titles may be provided, particularly when trying to express the title in more than one language (use the “xml:lang” attribute to indicate the language if not English/en).
- **creator ; metadataProvider ; associatedParty ; contact** : These are the people and organizations responsible for the dataset resource, either as the creator, the metadata provider, contact person or any other association. The following details can be provided:
 - **individualName**
 - * **givenName**
 - * **surName**
 - **organizationName**: Name of the institution.
 - **positionName**: to be used as alternative to persons names (leave **individualName** blank and use **positionName** instead e.g. data manager).
 - **address**
 - * **deliveryPoint**
 - * **city**
 - * **administrativeArea**
 - * **postalCode**
 - * **country**
 - **phone**
 - **electronicMailAddress**
 - **onlineUrl** : personal website
 - **role**: used with **associatedParty** to indicate the role of the associated person or organization.
 - **userID**: e.g. ORCID.
 - * **directory**
- **pubDate**: The date that the resource was published. Use ISO 8601.
- **language**: The language in which the resource (not the metadata document) is written. Use ISO language code.
- **abstract** : Brief description of the data resource.
 - **para**
- **keywordSet**
 - **keyword** : Note only one keyword per keyword field is allowed.
 - **keywordThesaurus** : e.g. ASFA
- **additionalInfo** : OBIS checks this EML field for harvesting. It should contain *marine, harvested by iOBIS*.
 - **para**
- **coverage**
 - **geographicCoverage**
 - * **geographicDescription**: a short text description of the area. E.g. the river mouth of the Scheldt Estuary.
 - * **boundingCoordinates**
 - **westBoundingCoordinate**
 - **eastBoundingCoordinate**
 - **northBoundingCoordinate**
 - **southBoundingCoordinate**

- temporalCoverage : Use ISO 8601
 - * singleDateTime
 - * rangeOfDates
 - beginDate
 - calendarDate
 - endDate
 - calendarDate
- taxonomicCoverage: taxonomic information about the dataset. It can include a species list.
 - * generalTaxonomicCoverage
 - * taxonomicClassification
 - taxonRankName
 - taxonRankValue
 - commonName
- intellectualRights: Statement about IPR, Copyright or various Property Rights. Also read the [guidelines on the sharing and use of data in OBIS](#).
 - para
- purpose: A description of the purpose of this dataset.
 - para
- methods
 - methodStep: Descriptions of procedures, relevant literature, software, instrumentation, source data and any quality control measures taken.
 - sampling: Description of sampling procedures including the geographic, temporal and taxonomic coverage of the study.
 - studyExtent: Description of the specific sampling area, the sampling frequency (temporal boundaries, frequency of occurrence), and groups of living organisms sampled (taxonomic coverage).
 - samplingDescription: Description of sampling procedures, similar to the one found in the methods section of a journal article.
 - * para
 - qualityControl: Description of actions taken to either control or assess the quality of data resulting from the associated method step.
- project
 - title
 - identifier
 - personnel: The personnel field is used to document people involved in a research project by providing contact information and their role in the project.
 - description
 - funding: The funding field is used to provide information about funding sources for the project such as: grant and contract numbers; names and addresses of funding sources.
 - * para
 - studyAreaDescription
 - designDescription: The description of research design.
- maintenance
 - description
 - * para
 - maintenanceUpdateFrequency
- additionalMetadata
 - metadata

- * **dateStamp**: The date`Time` the metadata document was created or modified (ISO 8601).
- * **metadataLanguage**: The language in which the metadata document (as opposed to the resource being described by the metadata) is written
- * **hierarchyLevel**
 - **citation**: A single citation for use when citing the dataset. The IPT can also auto-generate a citation based on the metadata (people, title, organization, onlineURL, DOI etc).
 - **bibliography**: A list of citations that form a bibliography on literature related / used in the dataset
 - **resourceLogoUrl**: URL of the logo associated with a dataset.
 - **parentCollectionIdentifier**
 - **collectionIdentifier**
 - **formationPeriod**: Text description of the time period during which the collection was assembled. E.g., “Victorian”, or “1922 - 1932”, or “c. 1750”.
 - **livingTimePeriod**: Time period during which biological material was alive (for palaeontological collections).
 - **specimenPreservationMethod**
 - **physical**
 - **objectName**
 - **characterEncoding**
 - **dataFormat**
 - **externallyDefinedFormat**
 - **formatName**
 - **distribution**: URL links
 - **online**
 - **url function**="download"
 - **url function**="information"
- **alternateIdentifier**: It is a Universally Unique Identifier (UUID) for the EML document and not for the dataset. This term is optional.

2.4.3.1 Scenarios

2.4.3.1.1 Title The IPT requires you to provide a *Shortname*. Shortnames serve as an identifier for the resource within the IPT installation (so should be unique within your IPT), and will be used as a parameter in the URL to access the resource via the Internet. Please use only alphanumeric characters, hyphens, or underscores. E.g. *largenet_im* in http://ipt.vliz.be/eurobis/resource?r=largenet_im. After creating a new dataset resource, the field *titel* will be filled out with the short name you provided earlier. Please make sure you provide a dataset title following the guidelines below.

Dataset titles provided to OBIS node managers are often very cryptic, such as an acronym, and often only understandable by the data provider. However, to increase the discoverability and be useful for a larger audience, the dataset title should be as descriptive and complete as possible. OBIS recommends titles to contain information about the taxonomic, geographic and temporal coverage. If the dataset title does not meet these criteria and you believe the title should be changed, then contact the data provider with a suggestion or ask for a more descriptive title. If the dataset has already been published (made publicly available) - and therefore known by that title elsewhere, then the same title should be kept (even if it would not meet the proposed guidelines)! Changing the title of an already published dataset cannot be done, as this will generate confusion and possible duplicates in systems like OBIS or GBIF in a later stage.

The acronym or working title could still be documented in the metadata, so there is no confusion about how the full title is linked to the originally provided acronym or working title.

:exclamation: Always consult the data provider when changing a dataset title to a more workable and descriptive version.

| | |
|---------------------------|-----------------------------------|
| Originally received title | Title Recommended by Node Manager |
|---------------------------|-----------------------------------|

| | |
|----------|---|
| ----- | ----- |
| BIOCEAN | BIOCEAN database on deep sea benthic fauna |
| Biomór | Benthic data from the Southern Irish Sea from 1989-1991 |
| Kyklades | Zoobenthos of the Kyklades (Aegean Sea) |
| REPHY | Réseau de Surveillance phytoplanktonique |

2.4.3.1.2 Abstract The abstract or description of a dataset provides basic information on the content of the dataset. The information in the abstract should improve understanding and interpretation of the data. It is recommended that the description indicates whether the dataset is a subset of a larger dataset and – if so – provide a link to the parent metadata and/or dataset.

If the data provider or OBIS node require bi- or multilingual entries for the description (e.g. due to national obligations) then the following procedure can be followed:

- Indicate English as metadata language
- Enter the English description first
- Type a slash (/)
- Enter the description in the second language

Example

The Louis-Marie herbarium grants a priority to the Arctic-alpine, subarctic and boreal species from the province of Quebec and the northern hemisphere. This dataset is mainly populated with specimens from the province of Quebec. / L’Herbier Louis-Marie accorde une priorité aux espèces arctiques-alpines, subarctiques et boréales du Québec, du Canada et de l’hémisphère nord. Ce jeu présente principalement des spécimens provenant du Québec.

2.4.3.1.3 People and Organizations The EML has several possible roles/functions to describe a contact, creator, metadata provider and associated party.

The **contact** is the person or organization that curates the resource and who should be contacted to get more information or to whom questions with the resource or data should be addressed. Although a number of fields are not required, we strongly recommend providing as much information as possible, and in particular the email address. This will also be the contact information that appears on the OBIS metadata pages.

The **creator** is the person or organization responsible for the original creation of the resource content. When there are multiple creators, the one that bears the greatest responsibility is the resource creator, and other people can be added as associated parties with a role such as ‘originator’, ‘content provider’, ‘principle investigator’, etc.

Possible functions/roles:

- Originator (person/organization that originally gathered/prepared the dataset)
- Content provider (principal person/organization that contributed content to the dataset)

If the resource contact and the resource creator are identical, the IPT allows you to easily copy the information.

The **metadata provider** is the person or organization responsible for producing the resource metadata. If the metadata are provided by the original data provider, then his/her contact details should be filled in. If no metadata are available (e.g. for historical datasets, with no contact person), then the metadata can be completed by e.g. the OBIS node manager and the OBIS node manager becomes the metadata provider.

The **Associated Parties** contains information about one or more people or organizations associated with the resource in addition to those already covered on the IPT Basic Metadata page. For example, if there would be multiple contact persons or metadata creators, they can be added in this IPT section. The principle contact/creator should, however, be added in the IPT Basic Metadata section. It is recommended to complete this section together with the IPT Basic Metadata page, to avoid confusion or overlap in added information.

Possible functions/roles for associated parties are:

- Custodian steward (person/organization responsible for/takes care of the dataset paper)
- Owner (person/organization that owns the data – may or may not be the custodian)
- Point of contact (person/organization to contact for further information on the dataset)
- Principle investigator (primary scientific contact associated with the dataset)

Notes

The owner of a dataset will, in most cases, be an institute, and not an individual person. Although the fields ‘last name’, and ‘position’ are indicated as mandatory fields, it is possible to just add the institute name in the ‘last name’ field for the role ‘owner’.

The contact persons in the metadata (contact, creator, metadata creator) are used in the dataset citation (auto-generation) and those added as ‘associated parties’ are not included as “co-authors”.

2.4.3.1.4 License and IP Rights OBIS has published its guidelines on the sharing and use of data [here](#). The recommended licenses for datasets published in OBIS are the Creative Commons Licenses (CC-0, CC-BY, CC-BY-NC), of which CC-0 is the most preferred at CC-BY-NC is least preferred. A Creative Commons license means:

- You are free:
 - to share => to copy, distribute and use the database
 - to create => to produce works from the database
 - to adapt => to modify, transform and build upon the database
- In case of CC-0: **public domain**: CC-0 is the preferred option identified by the OBIS steering group. You waive any copyright you might have over the data(set) and dedicate it to the public domain. You cannot be held liable for any (mis)use of the data either. Although CC-0 doesn’t legally require users of the data to cite the source, it does not take away the moral responsibility to give attribution, as is common in scientific research. A good blog on why using CC-0 can be found [here](#).
- In case of CC-BY: **Attribution**: You must attribute any public use of the database, or works produced from the database, in the manner specified in the license. For any use or redistribution of the database, or works produced from it, you must make clear to others the license of the database and keep intact any notices on the original database.
- In case of CC-BY-NC: **non-commercial**: like CC-BY but commercial use is not allowed. This licence can be problematic when the data is re-used in scientific journals.

2.4.3.1.5 Coverage

2.4.3.1.5.1 Geographic Coverage The IPT allows you to enter the geographic coverage by dragging the markers on the given map or by filling in the coordinates of the bounding box. In the description field, a more elaborate text can be provided to describe the spatial coverage indicating the larger geographical area where the samples were collected. For the latter, the sampling locations can be plotted on a map and – by making use of a Gazetteer – the wider geographical area can be derived: e.g. the relevant Exclusive Economic Zone (EEZ), IHO, FAO fishing area, Large Marine Ecosystem (LME), Marine Ecoregions of the World (MEOW), etc. The [Marine Regions’ Gazetteer](#) might prove to be a useful online tool to define the most relevant sea area(s). There are also [LifeWatch Geographical Services](#) that translate geographical positions to these wider geographical areas.

The information given in this section can also help the OBIS node manager in geographic quality control. If the geographic coverage in the EML e.g. is “North Sea”, but a number of data points are outside of this scope, then this may indicate errors, and should be checked with the data provider.

If the dataset covers multiple areas (e.g. samples from the North Sea and the Mediterranean Sea), then this should clearly be mentioned in the `geographicDescription` field. Note that the IPT only allows one bounding

box.

2.4.3.1.5.2 Taxonomic Coverage This section can capture two things:

1. A description of the range of taxa that are addressed in the data set. OBIS recommends to only add the higher classification (Kingdom, Class or Order) of the involved groups (e.g. Bivalvia, Cetacea, Aves, Ophiuroidea. . .). You can easily draw a list of higher taxonomic ranks from the WoRMS taxon match service (or ask the data provider). The taxonomic coverage is not a mandatory field, but the information stored here can be very useful as background information. The description can also contain common names, such as e.g. benthic foraminifera or mussels.
2. An overview of all the involved taxa (not recommended, as all the taxa are already listed in the dataset).

Note

OBIS also recommends to add information on the (higher) taxonomic groups in the (descriptive) dataset title and abstract.

2.4.3.1.5.3 Temporal Coverage The temporal coverage will be a date range, which can easily be documented. If it is a single date, the start and end date will be the same. The information added here can be used as a quality check for the actual dates in the datasets.

2.4.3.1.6 Keywords Relevant keywords facilitate the discovery of a dataset. An indication of the represented functional groups can help in a general search (e.g. plankton, benthos, zooplankton, phytoplankton, macrobenthos, meiobenthos . . .). Assigned keywords can be related to taxonomy, habitat, geography or relevant keywords extracted from thesauri such as the [ASFA thesaurus](#), the [CAB thesaurus](#) or [GCMD keywords](#).

As taxonomy and geography are already covered in previous sections, there is no need to repeat related keywords here. Please consult your data provider which (relevant) keywords can be assigned.

2.4.3.1.7 Project If the dataset in this resource is produced under a certain project, the metadata on this project can be documented here. Part of the information entered here, can partly overlap with information given in other sections of the metadata (e.g. study area description can have lot of parallel with the geographic coverage section). This is not a problem.

2.4.3.1.8 Sampling Methods The EML can contains descriptions of the sampling and data processing methods. Note that OBIS best practice is to add sampling facts to the extended MeasurementorFact extension, linked to the sampling events in the EventCore.

2.4.3.1.9 Citations The dataset citation allows users to properly cite the datasets in further publications or other uses of the data. The OBIS download function provides a list of the dataset citations packaged with the data in a zipped file. A dataset citation is different from the data source citation (in case the data is digitized from a publication), and these references can be added to the additional metadata (see bibliography below). A dataset citation can have the same format of a journal article citation, and should include the authors (contact, creator, principle investigator, data managers, custodians, collectors. . .), the title of the dataset, the name of the data publisher (or custodian institute), and the access point URL to the resource.

GBIF's IPT has an auto-generation - Turn On/Off - tool to let the IPT auto-generate the resource citation for you. The citation includes a version number, which is especially important for datasets that are continuously updated. The dataset citation can also include a Citation Identifier - a DOI, URI, or other persistent identifier that resolves to an online dataset web page.

The OBIS node data managers should try to implement a certain degree of format standardization for the dataset citations. The IPT provides an option to auto-generate a citation based on the EML and is formatted as follows: {dataset.authors} ({dataset.pubDate}) {dataset.title}. [Version {dataset.version}]. {organization.title}. {dataset.type} Dataset {dataset.doi}, {dataset.url}

2.4.3.1.10 Bibliography The EML can include the citation of the publications that are related to the described dataset. They can describe the dataset, be based on the dataset or be used in this dataset. Publications can be scientific papers, reports, PhD or master theses. If available, the citation should include the DOI at the end.

This overview will contribute to a better understanding of the data as these publications can hold important additional information on the data and how they were acquired.

2.4.3.1.11 Collection Data This IPT section should only be filled out if there are specimens held in a museum. If relevant, it is strongly recommended that this information is supplied by the data provider or left blank.

2.4.3.1.12 External Links This section can include URLs to the resource homepage, to download or find additional information.

Links to the online dataset on the OBIS website can be added once the data is available there. For these OBIS links, the required fields should be completed as follows:

- Name: online dataset
- Character set: UTF-8
- Data format: html

If other links are added, then the data format for web-based data is 'html'. If the link refers to a file, the data format of the file will need to be added (e.g. .xlsx, .pdf ...). The character set for all Darwin Core files is UTF-8, whereas for other web pages this can vary.

2.4.3.1.13 Additional Metadata Any remaining information that could not be catalogued under any of the other metadata, can be mentioned here.

2.5 OBIS nodes

OBIS Nodes are either national projects, programmes, institutes or organizations, National Ocean Data Centers or regional or international projects, programmes and institutions or organization that carry out data management functions. OBIS nodes are responsible for representing all aspects of OBIS within a particular region or taxonomic domain. The node is intended to establish relationships with key data providers within their geographical (or taxonomic) area of responsibility and bring data and corresponding meta data into the global database to be shared with the OBIS community. Nodes are responsible for all aspects of the data from gaining permission to provide access to the data, to ensuring a certain level of data quality and for the transfer of these datasets to the global OBIS database. In addition, Nodes provide support for the full implementation of OBIS worldwide by serving on the IODE Steering Group for OBIS and any relevant Task Teams. Each node may also maintain a data presence on the Internet representing their specific area of responsibility.

The OBIS system architecture is structured on the basis of three tiers of OBIS nodes. At tier I is the aggregate global database and is managed by the project office in Ostend (Belgium). Tier I is also responsible for providing data access, web services, statistics and data products. Tier II nodes are responsible for many of the quality control and other data management tasks that were originally born by the global database. This helps to reduce the cost born by the Project Office and build a stronger network capacity. An added benefit of this structure is the ability to accept tier III nodes. These tier III nodes are willing participants in adding data to the OBIS network, but may not have the expertise or resource base to meet all of the responsibilities of a tier II node. The addition of tier III nodes provides two added benefits to the network. First, expanded capacity for reaching out to the science community and second an opportunity for larger tier II nodes to mentor smaller or new member nodes. Tier II and III nodes will coordinate outreach to respective data providers. Only Tier II and global thematic taxonomic Nodes would feed the global dataset directly.

2.5.1 Terms of Reference of OBIS nodes

- Receiving or harvesting marine biodiversity data (and metadata) from national, regional and international programs, and the scientific community at large, and from tier III nodes by tier II nodes, and from tier II nodes by tier I nodes
- Perform data validation (using standards, tools and best practices), as described in the OBIS manual (Tier II)
- Reporting the results of quality control directly to data collectors/originator (or tier III node) as part of the quality assurance activity
- Making data (and metadata) available to OBIS using agreed upon standards and formats which are described in the OBIS Manual (Tier II), making data available to tier II nodes (Tier III)
- Become a member of the IODE steering group for OBIS, attend the SG-OBIS annual meeting and report on node activities
- Provide indicators on up-time, responsiveness and data processed by nodes and present a report to SG-OBIS
- Customer support (data queries, analyses, feedback).
- Outreach and Capacity Building (i.e., providing expertise, training and support in data management, technologies, standards and best practices).
- Control data access, terms of use and sharing policies
- Comply with the IOC/OBIS data policy for using and sharing OBIS data
- Build customized data portals (optional)
- Engage in stakeholder groups (recommended)
- Contribute to the development of standards and best practices in OBIS (recommended)
- Contribute to the development of open-source tools in OBIS (recommended)
- Ensuring the long-term preservation of the data, metadata and associated information required for correct interpretation of the data (including version-control) (recommended)

2.5.2 How to become an OBIS node

OBIS nodes now operate under the IODE network as either National Oceanographic Data Centres (NODCs) or Associate Data Unites (ADUs). Prospective nodes are required to apply to the IODE for membership.

The procedure to become an OBIS node is as follows:

- If you are an existing NODC (within the IODE network) and the OBIS node activities fall under the activities of the NODC:
 - Send a letter expressing your interest to become an OBIS node (including contact information of the OBIS node manager, and geographical/thematic scope of your OBIS node)
- If you are not an existing NODC:
 - Email your [application form](#) to become an IODE Associate Data Unit (ADU), with a specific role as OBIS node. Applications for ADU membership in OBIS shall be reviewed by the IODE Officers in consultation with the IODE Steering Group for OBIS.

2.5.3 OBIS Node Health Status Check and Transition Strategy

OBIS nodes should operate under IODE as either IODE/ADU or IODE/NODC. As such OBIS nodes are a member of the IODE network.

The IODE Steering Group (SG) for OBIS evaluates the health status of OBIS nodes at each annual SG meeting, and considers an OBIS node as **inactive** when it meets any of the following conditions:

1. The OBIS node manager recurrently fails to answer the communications from the project manager or the SG co-chairs in the last 12 months
2. The OBIS node manager or a representative fails to attend (personally or virtually) the last 2 SG meetings without any written reason

3. The OBIS node does not have an IPT
4. The OBIS node has an IPT, but it has not been running for the last 12 months
5. The datasets in the OBIS node's IPT have been removed and not restored in the last 12 months (without any explanation)
6. The OBIS node has not provided new data for the last 2 years

The OBIS Secretariat prepares a health status check report of each OBIS node based on the six items above and informs the OBIS node manager on their status 3 months before the SG meeting. At the SG meeting, the SG-OBIS co-chair will present the results of the OBIS nodes health status check report including a listing of the inactive OBIS nodes. The SG-OBIS members representing active OBIS Nodes will make one of the following decisions:

1. Request the inactive OBIS node to submit a plan with actions, deliverables and times to improve their performance, within 3 months, to the OBIS Secretariat. This plan is reviewed and accepted by the OBIS-Executive Committee Or
2. Provide a recommendation to the IOC Committee on IODE to remove the OBIS node from the IODE network.

In either case, the OBIS Secretariat will inform the OBIS node manager of the SG-OBIS decision, with a copy to the IODE officers and the IODE national coordinator for data management of the country concerned.

The IODE Committee is requested to consider the recommendation from the OBIS Steering Group and it may either accept the recommendation or request the inactive OBIS node to submit an action plan (option 1).

When the inactive OBIS node is removed from the IODE network, the SG-OBIS will ask whether another OBIS node is interested in taking over the responsibilities of the removed OBIS node, until a new OBIS node in the country/region is established.

Chapter 3

Data Formatting

Formatting data can be challenging. This section of the manual deals with how to format data for OBIS.

3.1 Dataset structure

3.1.0.1 When to use Event Core

- When the dataset contains abiotic measurements, or other biological measurements which are related to an entire sample (not a single specimen)
- When specific details are known about how a biological sample was taken and processed. These details can be expressed using the eMoF and the newly developed [Q01 vocabulary](#).

Event Core should be used in combination with the Occurrence Extension and the eMoF.

3.1.0.2 When to use Occurrence Core

- No information on how the data was sampled or samples were processed.
- No abiotic measurements are taken or provided
- Biological measurements are made on individual specimens (each specimen is a single occurrence record)
- This is often the case for museum collections, citations of occurrences from literature, individual sightings.

Datasets formatted in Occurrence Core can use the eMoF Extension for biotic measurements or facts.

3.2 Extensions accepted by OBIS

3.3 Constructing and using identifier codes

3.3.1 eventID

3.3.2 occurrenceID

3.4 Darwin Core Term Checklist for OBIS

For your convenience, we have created a checklist of all the Darwin Core terms relevant for OBIS data providers. You can reference this list to quickly see which terms are required by OBIS, which file (Event, Occurrence, eMoF, DNA) they belong in, and which Darwin Core class it relates to.

Note that when you publish the dataset into the IPT, if you use a term not on this list it will be an unmapped field and will **not** be published alongside your data.

| Term | OBIS | Required | DarwinCore Class | Event | Occurrence | eMoF |
|-------------------------|----------------------|------------|------------------|-------|------------|------|
| eventDate | required | event | x | x | | |
| eventID | required | event | x | x | x | |
| decimalLatitude | required | location | x | x | | |
| decimalLongitude | required | location | x | x | | |
| occurrenceID | required | occurrence | x | x | x | |
| occurrenceStatus | required | occurrence | x | | | |
| basisOfRecord | required | record | x | x | | |
| scientificName | required | taxon | x | | | |
| scientificNameID | required | taxon | | x | | |
| DNA_sequence | strongly recommended | dna | | | | x |
| env_broad_scale | strongly recommended | dna | | | | x |
| env_local scale | recommended | dna | | | | x |
| env_medium | strongly recommended | dna | | | | x |
| lib_layout | recommended | dna | | | | x |
| nucl_acid_amp | recommended | dna | | | | x |
| nucl_acid_ext | recommended | dna | | | | x |
| otu_class_appr | recommended | dna | | | | x |
| otu_db | recommended | dna | | | | x |
| otu_seq_comp_appr | recommended | dna | | | | x |
| pcr_primer_forward | recommended | dna | | | | x |
| strongly | | | | | | |
| pcr_primer_name_forward | strongly recommended | dna | | | | x |
| pcr_primer_name_reverse | strongly recommended | dna | | | | x |
| pcr_primer_reference | strongly recommended | dna | | | | x |
| pcr_primer_reverse | strongly recommended | dna | | | | x |
| samp_name | recommended | dna | | | | x |
| samp_vol_we_dna_ext | recommended | dna | | | x | |
| seq_meth | recommended | dna | | | | x |
| sop | recommended | dna | | | | x |
| target_gene | strongly recommended | dna | | | | x |
| target_subfragment | strongly recommended | dna | | | | x |

3.5 How to format Occurrence tables

3.6 How to format Event tables

3.7 How to format extendedMeasurementOrFact tables

3.8 Choosing Vocabularies for your dataset

3.8.1 Match your data with DwC vocabulary

3.8.2 How to correctly map eMoF terms to preferred BODC vocabulary

3.8.2.0.1 MeasurementOrFact vocabularies The MeasurementOrFact terms `measurementType`, `measurementValue` and `measurementUnit` are completely unconstrained and can be populated with free text annotation. While free text offers the advantage of capturing complex and as yet unclassified information, the inevitable semantic heterogeneity (e.g. of spelling or wording) becomes a major challenge for effective data integration and analysis. Hence, OBIS added 3 new terms: `measurementTypeID`, `measurementValueID` and `measurementUnitID` to standardise the measurement types, values and units. Note that `measurementValueID` is not used for standardizing numeric measurements. The three new terms should be populated using controlled vocabularies referenced using Unique Resource Identifiers (URIs). OBIS recommends to use the internationally recognized [NERC Vocabulary Server](https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/), developed by the British Oceanographic Data Centre (BODC), which can be searched through https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/.

The following vocabularies are recommended for populating `measurementTypeID`, `measurementValueID`, and `measurementUnitID`:

3.8.2.0.1.1 measurementTypeID

- BODC Parameter Usage Vocabulary (P01)
 - documentation: <https://github.com/nvs-vocabs/P01>

- vocabulary: <http://vocab.nerc.ac.uk/collection/P01/current/>
- search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/P01/
- OBIS sampling instruments and methods attributes (Q01)
 - vocabulary: <http://vocab.nerc.ac.uk/collection/Q01/current/>
 - search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/Q01/

3.8.2.0.1.2 measurementValueID

- Sampling instruments and sensors (SeaVoX Device Catalogue)
 - documentation: <https://github.com/nvs-vocabs/L22>
 - vocabulary: <http://vocab.nerc.ac.uk/collection/L22/current>
 - search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/L22/
- Sampling instrument categories (SeaDataNet device categories)
 - documentation: <https://github.com/nvs-vocabs/L05>
 - vocabulary: <http://vocab.nerc.ac.uk/collection/L05/current>
 - search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/L05/
- Vessels (ICES Platform Codes)
 - vocabulary: <http://vocab.nerc.ac.uk/collection/C17/current>
 - search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/C17/
- Sex (Gender)
 - documentation: <https://github.com/nvs-vocabs/S10>
 - vocabulary: <http://vocab.nerc.ac.uk/collection/S10/current/>
 - search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/S10/
- Lifestage
 - documentation: <https://github.com/nvs-vocabs/S11>
 - vocabulary: <http://vocab.nerc.ac.uk/collection/S11/current/>
 - search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/S11/
- Papers or manuals on the sampling protocol used
 - DOI
 - Handle for publications on IOC's Ocean Best Practices repository, for example: <http://hdl.handle.net/11329/304>

3.8.2.0.1.3 MeasurementUnitID

- Units
 - documentation: <https://github.com/nvs-vocabs/P06>
 - vocabulary: <http://vocab.nerc.ac.uk/collection/P06/current>
 - search: https://www.bodc.ac.uk/resources/vocabularies/vocabulary_search/P06/

3.8.3 Requesting new vocabulary terms

3.9 Common Data formatting issues

3.9.1 Temporal: Dates and times

3.9.1.1 Historical data

3.9.2 Spatial

3.9.2.1 Converting Coordinates

3.9.2.2 Geographical formats

3.9.3 Examples: ENV-DATA and DNA derived data

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 - 16S rRNA gene metabarcoding data of Pico- to Mesoplankton
- Fish abundance & distribution
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 - Survey & sighting data
 - Tracking data
- Microbes biomass & diversity
- Phytoplankton biomass & diversity
- Seagrass cover & composition
- Zooplankton biomass & diversity

3.9.3.1 eDNA & DNA derived data

The following example use cases draw on both the [GBIF guide](#) and the [DNA derived data extension](#) to illustrate how to incorporate a DNA derived data extension file into a Darwin Core archive. Note: for the purposes of this section, only required Occurrence core terms are shown, in addition to all eDNA & DNA specific terms. For additional Occurrence core terms, refer to [Occurrence](#).

3.9.3.1.1 eDNA data from Monterey Bay, California The data for this example is from the use case “18S Monterey Bay Time Series: an eDNA data set from Monterey Bay, California, including years 2006, 2013 - 2016”. The data from this study originate from marine filtered seawater samples that have undergone metabarcoding of the 18S V9 region.

Occurrence core:

We can populate the Occurrence core with all the required and highly recommended fields, as well as considering the eDNA and DNA specific fields. The Occurrence core contain the taxonomic identification of each ASV observed; its number of reads, as well as relevant metadata including the sample collection location, references for the identification procedure, and links to archived sequences.

`OccurrenceID` and `basisOfRecord` are some of the required Occurrence core terms, in addition to the highly recommended fields of `organismQuantity` and `organismQuantityType`. A selection of samples from this plate

were included in another publication (Djurhuus et al., 2020), which is recorded in `identificationReferences` along with the GitHub repository where the data can be found.

| occurrenceID | basisOfRecord | organismQuantity | OrganismQuantityType | associatedSequences |
|---------------------------|----------------|------------------|----------------------|--------------------------------------|
| 11216c01_12_edna_1_S_occ1 | MaterialSample | 19312 | DNA sequence reads | NCBI BioProject acc. nr. PRJNA433203 |
| 11216c01_12_edna_2_S_occ1 | MaterialSample | 16491 | DNA sequence reads | NCBI BioProject acc. nr. PRJNA433203 |
| 11216c01_12_edna_3_S_occ1 | MaterialSample | 21670 | DNA sequence reads | NCBI BioProject acc. nr. PRJNA433203 |

| sampleSizeValue | sampleSizeUnit | identificationReferences | identificationRemarks |
|-----------------|--------------------|--|--|
| 147220 | DNA sequence reads | GitHub repository Djurhuus et al. 2020 | unassigned, Genbank nr Release 221 September 20 2017 |
| 121419 | DNA sequence reads | GitHub repository Djurhuus et al. 2020 | unassigned, Genbank nr Release 221 September 20 2017 |
| 161525 | DNA sequence reads | GitHub repository Djurhuus et al. 2020 | unassigned, Genbank nr Release 221 September 20 2017 |

DNA Derived Data extension:

Next, we can create the **DNA Derived Data extension** which will be connected to the Occurrence core with the use of `occurrenceID`. This extension contains the DNA sequences and relevant DNA metadata, including sequencing procedures, primers used and SOP's. The recommended use of ENVO's biome classes were applied to describe the environmental system from which the sample was extracted. The samples were collected by CTD rosette and filtered by a peristaltic pump system. Illumina MiSeq metabarcoding was applied for the target_gene 18S and the target_subfragment, V9 region. URL's are provided for the protocols followed for nucleic acids extraction and amplification.

For a detailed description of the steps taken to process the data, including algorithms used, see the original publication. Adding Operational Taxonomic Unit (OTU) related data are highly recommended and should be as complete as possible, for example:

| occurrenceID | env-broad_scale | env_local_scale | env_medium |
|---------------------------|------------------------------|-------------------------------|---|
| 11216c01_12_edna_1_S_occ1 | marine biome (ENVO:00000447) | coastal water (ENVO:00001250) | waterborne particulate matter (ENVO:01000436) |
| 11216c01_12_edna_2_S_occ1 | marine biome (ENVO:00000447) | coastal water (ENVO:00001250) | waterborne particulate matter (ENVO:01000436) |
| 11216c01_12_edna_3_S_occ1 | marine biome (ENVO:00000447) | coastal water (ENVO:00001250) | waterborne particulate matter (ENVO:01000436) |

| samp_vol_we_dna_ext | nucl_acid_ext | nucl_acid_amp | lib_layout | target_gene |
|---------------------|--|--|------------|-------------|
| 1000ml | dx.doi.org/10.17504/protocols.io.xjufknw | dx.doi.org/10.17504/protocols.io.n2vdge6 | paired | 18S |
| 1000ml | dx.doi.org/10.17504/protocols.io.xjufknw | dx.doi.org/10.17504/protocols.io.n2vdge6 | paired | 18S |
| 1000ml | dx.doi.org/10.17504/protocols.io.xjufknw | dx.doi.org/10.17504/protocols.io.n2vdge6 | paired | 18S |

| target_subfragment | seq_meth | otu_class_appr | otu_seq_comp_appr |
|--------------------|----------------------|------------------|---|
| V9 | Illumina MiSeq 2x250 | dada2;1.14.0;ASV | blast;2.9.0+;80% identity;e-value cutoff: x MEGAN6;6.18.5;bitscore: 100 :2% |
| V9 | Illumina MiSeq 2x250 | dada2;1.14.0;ASV | blast;2.9.0+;80% identity;e-value cutoff: x MEGAN6;6.18.5;bitscore: 100 :2% |
| V9 | Illumina MiSeq 2x250 | dada2;1.14.0;ASV | blast;2.9.0+;80% identity;e-value cutoff: x MEGAN6;6.18.5;bitscore: 100 :2% |

| otu_db | sop | DNA_sequence |
|----------------|---|------------------|
| Genbank nr;221 | dx.doi.org/10.17504/protocols.io.xjufknw or GitHub repository | GCTACTACCGATT... |
| Genbank nr;221 | dx.doi.org/10.17504/protocols.io.xjufknw or GitHub repository | GCTACTACCGATT... |
| Genbank nr;221 | dx.doi.org/10.17504/protocols.io.xjufknw or GitHub repository | GCTACTACCGATT... |

| pcr_primer_forward | pcr_primer_reverse | pcr_primer_name_forward | pcr_primer_name_reverse | pcr_primer_reference |
|--------------------|------------------------------------|-------------------------|-------------------------|----------------------------|
| GTACACACCGCCCGTC | TGATCCTTCTGCAGGTTACCT 300 f | | EukBr | Amaral-Zettler et al. 2009 |
| GTACACACCGCCCGTC | TGATCCTTCTGCAGGTTACCT 300 f | | EukBr | Amaral-Zettler et al. 2009 |
| GTACACACCGCCCGTC | TGATCCTTCTGCAGGTTACCT 300 f | | EukBr | Amaral-Zettler et al. 2009 |

3.9.3.1.2 16S rRNA gene metabarcoding data of Pico- to Mesoplankton DNA derived datasets can also include an extendedMeasurementsOrFact (eMoF) extension file, in addition to the Occurrence and DNA derived extensions. In this example, environmental measurements were provided in an eMoF file, in

addition to the DNA derived data and occurrence data. Here we show how to incorporate such measurements in the extensions.

In the publication “Diversity of Pico- to Mesoplankton along the 2000 km Salinity Gradient of the Baltic Sea”, a dataset with 16S rRNA gene metabarcoding data of surface water microbial communities was created from 21 off-shore stations, following a transect from Kattegat to the Gulf of Bothnia in the Baltic Sea. The full dataset entitled “Diversity of Pico- to Mesoplankton along the 2000 km Salinity Gradient of the Baltic Sea (Hu et al. 2016)” is available from GBIF.

Occurrence core:

The Occurrence core contain information about the organisms in the sample including the taxonomy and quantity of organisms detected, the collection location, references for the identification procedure, and links to the sequences generated.

Important note: even though this dataset uses OTU identifiers for taxonomy (therefore not including scientificNameID) OBIS still recommends using scientificNameID.

| basisOfRecord | occurrenceID | eventID | eventDate |
|----------------|---|------------------|---------------------|
| MaterialSample | SBDI-ASV-3:16S_1:919a2aa9d306e4cf3fa9ca02a2aa5730 | SBDI-ASV-3:16S_1 | 2013-07-13 07:08:00 |
| MaterialSample | SBDI-ASV-3:16S_1:43e088977eba5732bfa45e20b1d8cdd2 | SBDI-ASV-3:16S_1 | 2013-07-13 07:08:00 |
| MaterialSample | SBDI-ASV-3:16S_1:887bc7033b46d960e893caceb711700b | SBDI-ASV-3:16S_1 | 2013-07-13 07:08:00 |

| organismQuantity | organismQuantityType | sampleSizeValue | sampleSizeUnit |
|------------------|----------------------|-----------------|--------------------|
| 2235 | DNA sequence reads | 12393 | DNA sequence reads |
| 795 | DNA sequence reads | 12393 | DNA sequence reads |
| 40 | DNA sequence reads | 12393 | DNA sequence reads |

| samplingProtocol | associatedSequences | identificationReferences | identificationRemarks |
|---|---|--|---|
| 200–500 mL seawater were filtered onto 0.22 µm pore-size mixed cellulose ester membrane filters; [https://doi.org/10.3389/fmicb.2016.00679] | [https://www.ebi.ac.uk/ena/browser/view/ERR1202034] | [https://docs.biodiversitydata.se/analyse-data/molecular-tools/#taxonomy-annotation] | DADA2:assignTaxonomy:addSpecies annotation against sbdi-gtdb=R06-RS202-1; confidence at lowest specified (ASV portal) taxon: 0.5 |
| 200–500 mL seawater were filtered onto 0.22 µm pore-size mixed cellulose ester membrane filters; [https://doi.org/10.3389/fmicb.2016.00679] | [https://www.ebi.ac.uk/ena/browser/view/ERR1202034] | [https://docs.biodiversitydata.se/analyse-data/molecular-tools/#taxonomy-annotation] | DADA2:assignTaxonomy:addSpecies annotation against sbdi-gtdb=R06-RS202-1; confidence at lowest specified (ASV portal) taxon: 0.56 |
| 200–500 mL seawater were filtered onto 0.22 µm pore-size mixed cellulose ester membrane filters; [https://doi.org/10.3389/fmicb.2016.00679] | [https://www.ebi.ac.uk/ena/browser/view/ERR1202034] | [https://docs.biodiversitydata.se/analyse-data/molecular-tools/#taxonomy-annotation] | DADA2:assignTaxonomy:addSpecies annotation against sbdi-gtdb=R06-RS202-1; confidence at lowest specified (ASV portal) taxon: 0.99 |

| decimalLatitude | decimalLongitude | taxonID | scientificName |
|-----------------|------------------|--------------------------------------|--------------------|
| 55.185 | 13.791 | ASV:919a2aa9d306e4cf3fa9ca02a2aa5730 | UBA6821 |
| 55.185 | 13.791 | ASV:43e088977eba5732bfa45e20b1d8cdd2 | Chthoniobacterales |
| 55.185 | 13.791 | ASV:887bc7033b46d960e893caceb711700b | BACL27 sp014190055 |

| kingdom | phylum | class | order | family | genus |
|----------|-------------------|------------------|--------------------|--------------------|---------|
| Bacteria | Verrucomicrobiota | Verrucomicrobiae | Chthoniobacterales | UBA6821 | UBA6821 |
| Bacteria | Verrucomicrobiota | Verrucomicrobiae | Chthoniobacterales | NA | NA |
| Bacteria | Actinobacteriota | Acidimicrobiia | Acidimicrobiales | Ilumatobacteraceae | BACL27 |

DNA Derived Data extension:

The DNA Derived Data extension for metabarcoding data contains the DNA sequences and relevant DNA metadata, primers and procedures. This example table contains the highly recommended and recommended fields as populated with the example dataset data. For this dataset, authors additionally provided measurements of of water sample temperature and salinity, which are provided in an **extendedMeasurementOrFact** extension file:

| id | env_broad_scale | env_local_scale | env_medium |
|---|----------------------------------|---------------------------------|-----------------------------------|
| SBDI-ASV-3:16S_1:919a2aa9d306e4cf3fa9ca02a2aa5730 | aquatic biome [ENVO_00002030] | marine biome [ENVO_00000447] | brackish water [ENVO_00002019] |
| SBDI-ASV-3:16S_1:43e088977eba5732bfa45e20b1d8cdd2 | aquatic biome [ENVO_00002030] | marine biome [ENVO_00000447] | brackish water [ENVO_00002019] |
| SBDI-ASV-3:16S_1:887bc7033b46d960e893caceb711700b | aquatic biome [ENVO_00002030] | marine biome [ENVO_00000447] | brackish water [ENVO_00002019] |

| lib_layout | target_gene | target_subfragment | seq_meth | sop |
|------------|-------------|--------------------|----------------|---|
| paired | 16S rRNA | V3-V4 | Illumina MiSeq | https://nf-co.re/ampliseq |
| paired | 16S rRNA | V3-V4 | Illumina MiSeq | https://nf-co.re/ampliseq |
| paired | 16S rRNA | V3-V4 | Illumina MiSeq | https://nf-co.re/ampliseq |

| pcr_primer_forward | pcr_primer_reverse | pcr_primer_name_forward | pcr_primer_name_reverse | DNA_sequence |
|---------------------------------------|--------------------|-------------------------|-------------------------|------------------------|
| CCTACGGGNGGCWGCAGGACTACHVGGGTATCTAATC | | | 805R | TCGAGAATTTTTCACAATG... |
| CCTACGGGNGGCWGCAGGACTACHVGGGTATCTAATC | | | 805R | TCGAGAATTTTTCACAATG... |
| CCTACGGGNGGCWGCAGGACTACHVGGGTATCTAATC | | | 805R | TGGGGAATCTTGCGCAATG... |

extendedMeasurementOrFact (eMoF) extension:

| measurementID | occurrenceID | measurementType | measurementValue | measurementUnit |
|------------------------------|---|-----------------|------------------|-----------------|
| SBDI-ASV-3:16S_1:temperature | SBDI-ASV-3:16S_1:919a2aa9d306e4cf3fa9ca02a2aa5730 | temperature | 16.9 | °C |
| SBDI-ASV-3:16S_1:salinity | SBDI-ASV-3:16S_1:919a2aa9d306e4cf3fa9ca02a2aa5730 | salinity | 7.25 | psu |
| SBDI-ASV-3:16S_1:temperature | SBDI-ASV-3:16S_1:lead98754d34073a4606f7ff1e94126e | temperature | 16.9 | °C |

3.9.3.2 Fish abundance & distribution

(example coming soon)

3.9.3.3 Hard coral cover & composition

(example coming soon)

3.9.3.4 Invertebrates abundance & distribution

(example coming soon)

3.9.3.5 Macroalgae canopy cover & composition

In this section we will encode a fictional macroalgal survey dataset into Darwin Core using the ENV-DATA approach, i.e. using an Event core with an Occurrence extension and an extendedMeasurementOrFact extension.

Figure: A fictional macroalgae survey with a single site, multiple zones, quadrats, and different types of transects.

Event core:

First we can create the Event core table by extracting all events in a broad sense and populating attributes such as time, location, and depth at the appropriate level. The events at the different levels are linked together using `eventID` and `parentEventID`. As the survey sites has a fixed location we can populate `decimalLongitude` and `decimalLatitude` at the top level event. The zones have different depths, so `minimumDepthInMeters` and

`maximumDepthInMeters` are populated at the zone level. Finally, as not all sampling was done on the same day, `eventDate` is populated at the quadrat and transect level.

| eventID | parentEventID | eventDate | decimalLongitude | decimalLatitude | minimumDepthInMeters | maximumDepthInMeters |
|------------|---------------|------------|------------------|-----------------|----------------------|----------------------|
| site_1 | | | 54.7943 | 16.9425 | | |
| zone_1 | site_1 | | | | 0 | 0 |
| zone_2 | site_1 | | | | 0 | 5 |
| zone_3 | site_1 | | | | 5 | 10 |
| quadrat_1 | zone_1 | 2019-01-02 | | | | |
| transect_1 | zone_2 | 2019-01-03 | | | | |
| transect_2 | zone_3 | 2019-01-04 | | | | |

Occurrence extension:

Next we can construct the Occurrence extension table. This table has the scientific names and links to the World Register of Marine Species in `scientificNameID`. The first column of the table references the events in the core table (see `quadrat_1` for example highlighted in green).

| id | occurrenceID | scientificName | scientificNameID |
|------------|--------------|----------------|---|
| quadrat_1 | occ_1 | Ulva rigida | urn:lsid:marinespecies.org:taxname:145990 |
| quadrat_1 | occ_2 | Ulva lactuca | urn:lsid:marinespecies.org:taxname:145984 |
| transect_1 | occ_3 | Plantae | urn:lsid:marinespecies.org:taxname:3 |
| transect_1 | occ_4 | Plantae | urn:lsid:marinespecies.org:taxname:3 |
| transect_2 | occ_5 | Gracilaria | urn:lsid:marinespecies.org:taxname:144188 |
| transect_2 | occ_6 | Laurencia | urn:lsid:marinespecies.org:taxname:143914 |

extendedMeasurementOrFact (eMoF) extension:

And finally there is the MeasurementOrFact extension table, which has attributes of the zones (shore height), the quadrats (surface area), the transects (surface area and length), and the occurrences (percentage cover and functional group). Attributes of occurrences point to the Occurrence extension table using the `occurrenceID` column (see `occ_1` and `occ_2` highlighted in blue and orange). Note that besides NERC vocabulary terms we are also referencing the CATAMI vocabulary for macroalgal functional groups.

| id | occurrenceID | measurementType | measurementTypeID | measurementValue | measurementValueID | measurementUnit | measurementUnitID |
|------------|--------------|------------------|---|-------------------|--------------------|-----------------|--|
| zone_1 | | shore height | ? | high | ? | | |
| quadrat_1 | | surface area | P01/current/AREABIO25 | | | m2 | P06/current/UMSQ |
| quadrat_1 | occ_1 | cover | P01/current/SDBIO240 | | | percent | P06/current/UPCT |
| quadrat_1 | occ_2 | cover | P01/current/SDBIO560 | | | percent | P06/current/UPCT |
| transect_1 | | surface area | P01/current/AREABIO25 | | | m2 | P06/current/UMSQ |
| transect_1 | | length | P01/current/LENTROCK | | | m | P06/current/ULAA |
| transect_1 | occ_3 | functional group | ? | sheet-like red | CATAMI:80300925 | | |
| transect_1 | occ_4 | functional group | ? | filamentous brown | CATAMI:80300931 | | |
| transect_1 | occ_3 | cover | P01/current/SDBIO810 | | | percent | P06/current/UPCT |
| transect_1 | occ_4 | cover | P01/current/SDBIO240 | | | percent | P06/current/UPCT |
| transect_2 | occ_5 | cover | P01/current/SDBIO410 | | | percent | P06/current/UPCT |
| transect_2 | occ_6 | cover | P01/current/SDBIO160 | | | percent | P06/current/UPCT |

3.9.3.6 Mangroves cover & composition

(example coming soon)

3.9.3.7 Marine birds abundance & distribution

The example for ENV-DATA collected with marine bird sightings/occurrences is based on the dataset “[RV Investigator Voyage IN2017_V02 Seabird Observations, Australia \(2017\)](#)”. In this dataset, seabird sightings were recorded continuously during daylight hours during a voyage to recover and redeploy moorings at the SOTS site, southwest of Tasmania, Australia, in March 2017. Observations were made from c.30 minutes before sunrise to c.30 minutes after sunset, extending to 300m in the forward quadrant with the best viewing conditions. There were 1200 observations from 38 species of birds along with 3 cetacean species and one seal.

This example will focus on the ENV-DATA associated with the bird sightings. The most frequently sighted bird species were *Puffinus tenuirostris* (Short-tailed Shearwater) and *Pachyptila turtur* (Fairy Prion).

For this dataset, human observation recorded individual bird sightings (thus, each specimen is a single occurrence). The dataset contains abiotic measurements (ENV-DATA) which are related to each individual sighting, instead of an entire sample. Therefore, we can create an Occurrence core with an eMoF extension that contain the abiotic environmental measurements or facts.

Occurrence core:

The Occurrence core is populated with the occurrence records of seabirds sighted during the RV voyages. Occurrence details and scientific names are provided here. All birds were observed above sea level, all `minimumDepthInMeters` and `maximumDepthInMeters` values equal zero.

| occurrenceID | eventDate | institutionCode | collectionCode |
|------------------|---------------------|--|----------------|
| in2017_v02_00998 | 2017-03-17 01:07:00 | Australasian Seabird Group, BirdLife Australia | in2017_v02_wov |
| in2017_v02_01380 | 2017-03-19 22:26:00 | Australasian Seabird Group, BirdLife Australia | in2017_v02_wov |
| in2017_v02_01012 | 2017-03-17 02:38:00 | Australasian Seabird Group, BirdLife Australia | in2017_v02_wov |

| basisOfRecord | recordedBy | organismQuantity | organismQuantityType | occurrenceStatus |
|------------------|-------------|------------------|----------------------|------------------|
| HumanObservation | EJW+CRC+TAH | 2 | individuals | present |
| HumanObservation | EJW+CRC+TAH | 1 | individuals | present |
| HumanObservation | EJW+CRC+TAH | 1 | individuals | present |

| decimalLatitude | decimalLongitude | coordinateUncertaintyInMeters | coordinatePrecision | footprintWKT |
|-----------------|------------------|-------------------------------|---------------------|-----------------------------|
| -43.40741 | 147.45576 | 200 | 0.0018 | POINT (147.45576 -43.40741) |
| -45.98644 | 142.1445 | 200 | 0.0018 | POINT (142.14450 -45.98644) |
| -43.40728 | 147.45549 | 200 | 0.0018 | POINT (147.45549 -43.40728) |

| scientificNameID | scientificName | scientificNameAuthorship | vernacularName |
|---|---------------------------------|--------------------------|---------------------|
| urn:lsid:marinespecies.org:taxname:343991 | Morus serrator | (Gray,1843) | Australasian Gannet |
| urn:lsid:marinespecies.org:taxname:212648 | Pachyptila turtur | (Kuhl,1820) | Fairy Prion |
| urn:lsid:marinespecies.org:taxname:707545 | Chroicocephalus novaehollandiae | Stephens,1826 | Silver Gull |

extendedMeasurementOrFact (eMoF) extension:

As shown in previous examples, the MeasurementOrFact extension table contains abiotic measurements or facts corresponding to an occurrence / sighting. Individual sightings and abiotic measurements are linked with `occurrenceID`. In the example dataset, the ENV-DATA consist of measurements taken during the moorings deployment at the SOTS site, at the time of the marine bird sightings. In addition to NERC vocabulary terms, authors also referenced the Australian Ocean Data Network (AODN) Discovery Parameter Vocabulary for *Sea-floor depth (m)* and *Sea Surface Temperature* as `measurementType`. NERC equivalents to the AODN terms are added as additional MeasurementOrFact (MoF) records.

| occurrenceID | measurementID | measurementType | measurementTypeID |
|------------------|-----------------------------------|---------------------------------|---|
| in2017_v02_00998 | in2017_v02_00998-depth | Sea-floor depth (m) | http://vocab.aodn.org.au/def/discovery_parameter/entity/574 |
| in2017_v02_00998 | in2017_v02_00998-depth | Sea-floor depth | http://vocab.nerc.ac.uk/collection/P01/current/MBANZZZZ/ |
| in2017_v02_00998 | in2017_v02_00998-air_pressure | Air Pressure (hPa) | http://vocab.nerc.ac.uk/collection/P01/current/CAPHZZ01 |
| in2017_v02_00998 | in2017_v02_00998-air_temp | Atmospheric temperature (deg C) | http://vocab.nerc.ac.uk/collection/P01/current/CTMPZZ01 |
| in2017_v02_00998 | in2017_v02_00998-wov_sea_state | Sea state | http://vocab.nerc.ac.uk/collection/C39/current/ |
| in2017_v02_00998 | in2017_v02_00998-sea_surface_temp | Sea surface temperature | http://vocab.aodn.org.au/def/discovery_parameter/entity/97 |
| in2017_v02_00998 | in2017_v02_00998-sea_surface_temp | Sea surface temperature | http://vocab.nerc.ac.uk/standard_name/sea_surface_temperature/ |
| in2017_v02_00998 | in2017_v02_00998-wind_direction | Wind direction (deg) | http://vocab.nerc.ac.uk/collection/P01/current/EWDAZZ01 |
| in2017_v02_00998 | in2017_v02_00998-wind_speed | Wind Speed (knt) | http://vocab.nerc.ac.uk/collection/P01/current/ESSAZZ01 |

| measurementValue | measurementValueID | measurementUnit | measurementUnitID |
|-----------------------|---|---------------------------------|---|
| 73.0313 | NA | Metres | http://vocab.nerc.ac.uk/collection/P06/current/ULAA |
| 73.0313 | NA | Metres | http://vocab.nerc.ac.uk/collection/P06/current/ULAA |
| 1024.91385 | NA | hPa | http://vocab.nerc.ac.uk/collection/P06/current/HPAX |
| 15.3 | NA | degrees Celsius | http://vocab.nerc.ac.uk/collection/P06/current/UPAA |
| moderate 1.25 - 2.5 m | http://vocab.nerc.ac.uk/collection/C39/current/4/ | | |
| 17.32 | NA | degrees Celsius | http://vocab.nerc.ac.uk/collection/P06/current/UPAA |
| 17.32 | NA | degrees Celsius | http://vocab.nerc.ac.uk/collection/P06/current/UPAA |
| 283 | NA | degrees | http://vocab.nerc.ac.uk/collection/P06/current/UABB |
| 5.49 | NA | Knots (nautical miles per hour) | http://vocab.nerc.ac.uk/collection/P06/current/UKNT |

3.9.3.8 Marine mammals abundance & distribution

In this section we will explore how to encode a survey data set into Darwin Core using the ENV-DATA approach. As an example, sections of the actual data set of **CETUS: Cetacean monitoring surveys in the Eastern North Atlantic**, is used.

Figure: A representation of the observation events of **CETUS: Cetacean monitoring surveys in the Eastern North Atlantic**, presenting the route **Madeira** as a site with three cruises (zones). Each **Cruise** is divided into different **Transects** and each transect contains a number of **Positions**.

Event core:

Create the Event core table by extracting all events and populating attributes. As in the previous example, the events at the different levels are linked together using **eventID** and **parentEventID**. As the survey observations were made at locations of cetacean sightings instead of fixed locations, we can populate **footprintWKT** and **footprintSRS** as location information. Not all sampling was done on the same day, therefore **eventDate** is populated at the transect level.

| eventID | parentEventID | eventDate | footprintWKT | footprintSRS |
|--------------------|---------------|-----------------|--|--------------|
| Madeira | | 2012-07/2017-09 | POLYGON ((-16.74 31.49, -16.74 41.23, -8.70 41.23, -8.70 31.49, -16.74 31.49)) | EPSG:4326 |
| Madeira:Cruise-001 | Madeira | 2012-07 | MULTIPOINT ((-8.7 41.19), (-9.15 38.7)) | EPSG:4326 |
| Madeira:Cruise-002 | Madeira | 2012-07 | MULTIPOINT ((-9.15 38.7), (-16.73 32.74)) | EPSG:4326 |
| Madeira:Cruise-003 | Madeira | 2012-07 | MULTIPOINT ((-16.73 32.74), (-9.15 38.7)) | EPSG:4326 |

Occurrence extension:

Construct the Occurrence extension table with the scientific names and links to the World Register of Marine Species in **scientificNameID**. The first column of the table references the events in the core table (see **Madeira:Cruise-001** highlighted in green). The **occurrenceID** corresponds to the Position of the observation (see **Transect-01:Pos-0001** and **CIIMAR-CETUS-0001** highlighted in blue, or **Transect-01:Pos-0002** and **CIIMAR-CETUS-0002** highlighted in orange).

| id | occurrenceID | scientificNameID | scientificName |
|---|-------------------|---|----------------|
| Madeira:Cruise-001:Transect-01:Pos-0001 | CIIMAR-CETUS-0001 | urn:lsid:marinespecies.org:taxname:2688 | Cetacea |
| Madeira:Cruise-001:Transect-01:Pos-0002 | CIIMAR-CETUS-0002 | urn:lsid:marinespecies.org:taxname:2688 | Cetacea |
| Madeira:Cruise-001:Transect-01:Pos-0003 | CIIMAR-CETUS-0003 | urn:lsid:marinespecies.org:taxname:2688 | Cetacea |
| Madeira:Cruise-001:Transect-02:Pos-0004 | CIIMAR-CETUS-0004 | urn:lsid:marinespecies.org:taxname:2688 | Cetacea |
| Madeira:Cruise-001:Transect-02:Pos-0005 | CIIMAR-CETUS-0005 | urn:lsid:marinespecies.org:taxname:2688 | Cetacea |
| Madeira:Cruise-001:Transect-02:Pos-0006 | CIIMAR-CETUS-0006 | urn:lsid:marinespecies.org:taxname:2688 | Cetacea |
| Madeira:Cruise-001:Transect-02:Pos-0007 | CIIMAR-CETUS-0007 | urn:lsid:marinespecies.org:taxname:2688 | Cetacea |

extendedMeasurementOrFact (eMoF) extension:

And finally, the extendedMeasurementOrFact extension table has attributes of the zones (such as Vessel speed and Vessel Heading), the Transects (such as Wave height and Wind speed), and the Positions (such as Visibility

and the Number of small/big ships >20m). Attributes of Positions point to the Occurrence extension table using the `occurrenceID` column (see `Transect-01:Pos-0001` and `Transect-01:Pos-0002` highlighted in blue and orange, respectively).

| id | occurrenceID | measurementType | measurementTypeID | measurementValue | measurementUnit | measurementUnitID |
|---|-------------------|------------------------------|----------------------|------------------|---------------------------------|-------------------|
| Madeira:Cruise-001 | | Vessel name | Q01/current/Q0100001 | Monte da Guia | | |
| Madeira:Cruise-001:Transect-01 | | Length of the track | P01/current/DSRNCV01 | 39.75 | km | P06/current/ULKM |
| Madeira:Cruise-001:Transect-01:Pos-0001 | CHIMAR-CETUS-0001 | Visibility | | 2000-4000 | Meters | P06/current/ULAA |
| Madeira:Cruise-001:Transect-01:Pos-0001 | CHIMAR-CETUS-0001 | Wind speed | P01/current/WMOCWFBF | 1 | Beaufort scale | |
| Madeira:Cruise-001:Transect-01:Pos-0001 | CHIMAR-CETUS-0001 | Wave height | | 2 | Douglas scale | |
| Madeira:Cruise-001:Transect-01:Pos-0001 | CHIMAR-CETUS-0001 | Number of big ships (>20m) | | 3 | | |
| Madeira:Cruise-001:Transect-01:Pos-0001 | CHIMAR-CETUS-0001 | Vessel heading | P01/current/HDNGGP01 | 206 | Degrees | P06/current/UAAA |
| Madeira:Cruise-001:Transect-01:Pos-0001 | CHIMAR-CETUS-0001 | Number of small ships (<20m) | | 0 | | |
| Madeira:Cruise-001:Transect-01:Pos-0001 | CHIMAR-CETUS-0001 | Vessel speed | P01/current/APSAGP01 | 16 | Knots (nautical miles per hour) | P06/current/UKNT |

3.9.3.9 Marine turtles abundance & distribution

3.9.3.9.1 Survey & sighting data This section deals with encoding survey and/ or sighting data of sea turtles into Darwin Core using the ENV-DATA approach. Extracts from the actual data set of **Presence of sea turtles collected through Fixed-Line-Transect monitoring across the Western Mediterranean Sea (Civitavecchia-Barcelona route) between 2013 and 2017**, are used as an example.

Event core:

The Event core is created by extracting all sighting events and populating the attributes at each event. The events at the different levels are linked together using `eventID` and `parentEventID`. In the example dataset, turtle sightings have been recorded since 2007, along a ferry route between Italy and Spain, as part of the monitoring project FLT Med Net (Fixed Line Transect Mediterranean monitoring Network). Turtle sighting locations can be given by populating the fields `footprintWKT` and `footprintSRS` with location information. Sightings were recorded at different dates, therefore `eventDate` is populated at the transect level.

| id | modified | datasetID | datasetName |
|--------------------------------|---|-----------|---|
| TURTLE_CBAR_201405-0507:59:08 | https://marineinfo.org/id/dataset/6403 | | Presence of sea turtles collected through Fixed-Line-Transect monitoring across the Western Mediterranean Sea |
| TURTLE_CBAR_201405-0507:59:08 | https://marineinfo.org/id/dataset/6403 | | Presence of sea turtles collected through Fixed-Line-Transect monitoring across the Western Mediterranean Sea |
| TURTLE_CBAR_201405060107:59:08 | https://marineinfo.org/id/dataset/6403 | | Presence of sea turtles collected through Fixed-Line-Transect monitoring across the Western Mediterranean Sea |
| TURTLE_CBAR_201405060207:59:08 | https://marineinfo.org/id/dataset/6403 | | Presence of sea turtles collected through Fixed-Line-Transect monitoring across the Western Mediterranean Sea |

| eventID | parentEventID | eventDate |
|-----------------------|------------------|---|
| TURTLE_CBAR_0043 | | 2013-04-03T05:30:00+02:00/2013-04-03T16:00:00+02:00 |
| TURTLE_CBAR_0045 | | 2013-04-18T05:22:00+02:00/2013-04-18T15:53:00+02:00 |
| TURTLE_CBAR_0045_0001 | TURTLE_CBAR_0045 | 2013-04-18T05:55:00+02:00 |
| TURTLE_CBAR_0045_0002 | TURTLE_CBAR_0045 | 2013-04-18T08:35:00+02:00 |

| eventRemarks | minimumDepthInMeters | maximumDepthInMeters | decimalLatitude | decimalLongitude |
|--------------|----------------------|----------------------|-----------------|------------------|
| transect | 0 | 0 | 41.26179967 | 4.933265167 |
| transect | 0 | 0 | 41.30371367 | 4.936571167 |
| sample | 0 | 0 | 41.3228 | 7.4984 |
| sample | 0 | 0 | 41.322845 | 5.995345 |

| geodeticDatum | coordinateUncertaintyInMeters | footprintWKT | footprintSRS |
|---------------|-------------------------------|--|--------------|
| EPSG:4326 | 222970.2874 | LINestring (7.602633333333 41.24378333333, 2.263897 41.279816) | EPSG:4326 |
| EPSG:4326 | 225420.0359 | LINestring (7.636983333333 41.32418333333, 2.236159 41.283244) | EPSG:4326 |
| EPSG:4326 | | POINT | EPSG:4326 |
| EPSG:4326 | | POINT | EPSG:4326 |

Occurrence extension:

The Occurrence extension contain details regarding the sighted animals and include **scientificName** and the links to the World Register of Marine Species in **scientificNameID**. The **EventID** references the events as in the Event core. This table further provides information on the **basisOfRecord** and **occurrenceStatus**.

| EventID | occurrenceID | datasetID | collectionCode | basisOfRecord |
|-----------------------|----------------------|---|-------------------|------------------|
| TURTLE_CBAR_0043 | AdL_TURTLE_CBAR_0001 | https://marineinfo.org/id/dataset/6403 | TURTLE_CBAR_13-17 | HumanObservation |
| TURTLE_CBAR_0045 | AdL_TURTLE_CBAR_0004 | https://marineinfo.org/id/dataset/6403 | TURTLE_CBAR_13-17 | HumanObservation |
| TURTLE_CBAR_0045_0001 | AdL_TURTLE_CBAR_0005 | https://marineinfo.org/id/dataset/6403 | TURTLE_CBAR_13-17 | HumanObservation |
| TURTLE_CBAR_0045_0002 | AdL_TURTLE_CBAR_0006 | https://marineinfo.org/id/dataset/6403 | TURTLE_CBAR_13-17 | HumanObservation |

| catalogNumber | recordedBy | occurrenceStatus |
|----------------------|---|------------------|
| AdL_TURTLE_CBAR_0001 | Ilaria Campana Miriam Paraboschi Erica Ercoli Erica | absent |
| AdL_TURTLE_CBAR_0004 | Antonella Arcangeli Cristina Berardi Lucilla Giulietti Claudia Boccardi | absent |
| AdL_TURTLE_CBAR_0005 | Antonella Arcangeli Cristina Berardi Lucilla Giulietti Claudia Boccardi | present |
| AdL_TURTLE_CBAR_0006 | Antonella Arcangeli Cristina Berardi Lucilla Giulietti Claudia Boccardi | present |

| scientificNameID | scientificName | kingdom | scientificNameAuthorship |
|---|-----------------|----------|--------------------------|
| urn:lsid:marinespecies.org:taxname:136999 | Cheloniidae | Animalia | Oppel, 1811 |
| urn:lsid:marinespecies.org:taxname:136999 | Cheloniidae | Animalia | Oppel, 1811 |
| urn:lsid:marinespecies.org:taxname:137205 | Caretta caretta | Animalia | Linnaeus, 1758 |
| urn:lsid:marinespecies.org:taxname:137205 | Caretta caretta | Animalia | Linnaeus, 1758 |

extendedMeasurementOrFact (eMoF) extension:

The extendedMeasurementOrFact extension (eMoF) for survey or sighting data contains additional attributes and measurements recorded during the survey, such as those regarding the Research Vessel, environmental conditions, and/ or animal measurements. These attributes are linked to the Occurrence extension using the **occurrenceID**. The example dataset contain measurements regarding the sampling method; speed and height of the Research Vessel as platform; wind force; sighting distance; as well as the count and developmental stage of the biological entity.

| id | occurrenceID | measurementType | measurementTypeID |
|-------------------|----------------------|---|---|
| TURTLE_CBAR_0043L | AdL_TURTLE_CBAR_0001 | BEAUFORT WIND FORCE | http://vocab.nerc.ac.uk/collection/P01/current/WMOCWFBF |
| TURTLE_CBAR_0043L | AdL_TURTLE_CBAR_0004 | Platform height | http://vocab.nerc.ac.uk/collection/P01/current/AHSLZZ01 |
| TURTLE_CBAR_0043L | AdL_TURTLE_CBAR_0005 | Sampling method | http://vocab.nerc.ac.uk/collection/Q01/current/Q0100003 |
| TURTLE_CBAR_0043L | AdL_TURTLE_CBAR_0006 | Speed measurement platform relative to ground surface {speed over ground} by unspecified GPS system | http://vocab.nerc.ac.uk/collection/P01/current/APSAGP01 |
| TURTLE_CBAR_0043L | AdL_TURTLE_CBAR_0005 | Developmental stage of biological entity specified elsewhere | http://vocab.nerc.ac.uk/collection/P01/current/LSTAGE01 |
| TURTLE_CBAR_0043L | AdL_TURTLE_CBAR_0006 | Count (assayed sample) of biological entity specified elsewhere | http://vocab.nerc.ac.uk/collection/P01/current/OCOUNT01 |
| TURTLE_CBAR_0043L | AdL_TURTLE_CBAR_0005 | Sighting distance | |

| measurementValue | measurementUnit | measurementUnitID |
|---------------------------------|---------------------------------|---|
| 0 | Beaufort scale | |
| 29 | Metres | http://vocab.nerc.ac.uk/collection/P06/current/ULAA/ |
| visual observation from ferries | | |
| 23.291 | Knots (nautical miles per hour) | http://vocab.nerc.ac.uk/collection/P06/current/UKNT/ |
| 1 | | |
| 20 | Metres | http://vocab.nerc.ac.uk/collection/P06/current/ULAA/ |

In addition to the measurements recorded by the example dataset, other measurements are also possible depending on the scope and aims of the survey project. The example dataset **Incidental sea snake and turtle bycatch records from the RV Southern Surveyor voyage SS199510, Gulf of Carpentaria, Australia (Nov 1995)** for example, contain information regarding the length and weight of the biological entity as follows:

extendedMeasurementOrFact (eMoF) extension:

| id | measurementID | occurrenceID | measurementType | measurementTypeID | measurementValue | measurementUnit | measurementUnitID |
|--------------|---------------------|--------------|-----------------|---|------------------|-----------------|---|
| SS199510-001 | SS199510-001-length | SS199510-001 | Length | http://vocab.nerc.ac.uk/collection/P01/current/OBSINDLX | 1250 | Millimetres | http://vocab.nerc.ac.uk/collection/P06/current/UXMM |
| SS199510-001 | SS199510-001-weight | SS199510-001 | Weight | http://vocab.nerc.ac.uk/collection/P01/current/SPWGXX01 | 800 | Grams | http://vocab.nerc.ac.uk/collection/P06/current/UGRM |
| SS199510-002 | SS199510-002-length | SS199510-002 | Length | http://vocab.nerc.ac.uk/collection/P01/current/OBSINDLX | 1630 | Millimetres | http://vocab.nerc.ac.uk/collection/P06/current/UXMM |
| SS199510-002 | SS199510-002-weight | SS199510-002 | Weight | http://vocab.nerc.ac.uk/collection/P01/current/SPWGXX01 | 1477.7 | Grams | http://vocab.nerc.ac.uk/collection/P06/current/UGRM |

3.9.3.9.2 Tracking data Encoding Tracking data into Darwin Core follows the same standards as that of survey/ sighting data. Tracking data should additionally indicate the accuracy in latitudinal and longitudinal measurements received from the positioning system, grouped by location accuracy classes. Extracts from the **extendedMeasurementOrFact extension (eMoF)** of the actual dataset **Ningaloo Outlook turtle tracking of Green turtles (Chelonia mydas), Western Australia (2018-present)**, are used as an example, following **ARGOS Location class codes**.

extendedMeasurementOrFact (eMoF) extension:

| id | measurementID | occurrenceID | measurementType | measurementValue | measurementValueID |
|---------|--------------------|--------------|----------------------|------------------|---|
| 2347540 | 2347540-argosclass | 2347540 | ARGOS Location Class | A | http://vocab.nerc.ac.uk/collection/R05/current/A |
| 2347541 | 2347541-argosclass | 2347541 | ARGOS Location Class | B | http://vocab.nerc.ac.uk/collection/R05/current/B |
| 2347542 | 2347542-argosclass | 2347542 | ARGOS Location Class | 2 | http://vocab.nerc.ac.uk/collection/R05/current/2 |
| 2347543 | 2347543-argosclass | 2347543 | ARGOS Location Class | 3 | http://vocab.nerc.ac.uk/collection/R05/current/3 |

3.9.3.10 Microbes biomass & diversity

(example coming soon)

3.9.3.11 Phytoplankton biomass & diversity

This example deals with encoding phytoplankton observation data, including environmental data, into Darwin Core. Extracts from the actual data set **LifeWatch observatory data: phytoplankton observations by imaging flow cytometry (FlowCam) in the Belgian Part of the North Sea**, are used as an example.

Event core:

The Event core contains events at the different levels and are linked together with **eventID** and **parentEventID**. In this example, the dataset contains records pointing to the origin, the in-situ sampling position as well as a record referring to the ex-situ collection of living specimens. In this case, the event type information is provided in **type**. The recommended practice for providing the **countryCode** is to use an ISO 3166-1-alpha-2 country code. If additional information regarding licencing is provided, these can be populated under **rightsHolder** and **accessRights**. The remaining Event core fields provide location data including **datasetID** and **datasetName**, **locationID**, **waterBody**, **maximumDepthInMeters**, **minimumDepthInMeters**, **decimalLongitude**, **decimalLatitude**, **coordinateUncertaintyInMeters**, **geodeticDatum** and **footprintSRS**.

| eventID | parentEventID | eventRemarks | eventDate | modified |
|---|------------------------------|--------------|---|---------------------|
| TripNR3242 | | cruise | 2017-05T13:18:00+00:00/2017-05T22:14:00+00:00 | 2021-10-21 15:52:00 |
| TripNR3242TripStationNR16781 | TripNR3242 | stationVisit | 2017-05-08T20:44:00+00:00/2017-05-08T20:55:00+00:00 | 2021-10-21 15:52:00 |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781 | sample | 2017-05-08T20:50:00+00:00 | 2021-10-21 15:52:00 |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781 | sample | 2017-05-08T20:50:00+00:00 | 2021-10-21 15:52:00 |

| datasetID | datasetName | locationID | waterBody | country | countryCode |
|---|---|------------|-----------|---------|-------------|
| https://marineinfo.org/id/dataset/4688 | LifeWatch observatory data: phytoplankton observations... | | North Sea | Belgium | BE |
| https://marineinfo.org/id/dataset/4688 | | JN17_5 | | | |
| https://marineinfo.org/id/dataset/4688 | | JN17_5 | | | |
| https://marineinfo.org/id/dataset/4688 | | JN17_5 | | | |

| minimumDepthInMeters | maximumDepthInMeters | decimalLatitude | decimalLongitude | geodeticDatum | coordinateUncertaintyInMeters | footprintSRS |
|----------------------|----------------------|-----------------|------------------|---------------|-------------------------------|--------------|
| 0 | 30.22 | 51.0131 | 1.90562 | EPSG:4326 | | EPSG:4326 |
| 0 | 1 | 51.01203 | 1.90217 | EPSG:4326 | 1.11 | EPSG:4326 |
| 3 | 3 | 51.01203 | 1.90217 | EPSG:4326 | 1.11 | EPSG:4326 |

Occurrence extension:

The Occurrence extension contains data of each occurrence with an **occurrenceID** and is linked to the Event core with the **eventID**. The Occurrence extension should provide information on the **basisOfRecord** and **occurrenceStatus**. Scientific names and links to the World Register of Marine Species should be provided under **scientificName** and **scientificNameID**, respectively.

| eventID | occurrenceID |
|---|--|
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598occurrenceIDTA_105598_(Pseudo-)pediastrium_5 |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598occurrenceIDTA_105598_Actinopterychus senarius_5 |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598occurrenceIDTA_105598_Actinopterychus splendens_5 |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598occurrenceIDTA_105598_Actinopterychus_5 |

| modified | basisOfRecord | occurrenceStatus | scientificNameID | scientificName |
|------------|---------------|------------------|--|---------------------------|
| 2021-10-21 | Occurrence | absent | urn:lsid:marinespecies.org:taxname:160560 | Hydrodictyaceae |
| 2021-10-21 | Occurrence | present | urn:lsid:marinespecies.org:taxname:148948 | Actinopterychus senarius |
| 2021-10-21 | Occurrence | present | urn:lsid:marinespecies.org:taxname:148949 | Actinopterychus splendens |
| 2021-10-21 | Occurrence | present | urn:lsid:marinespecies.org:taxname:148947 | Actinopterychus |

extendedMeasurementOrFact (eMoF) extension:

The eMoF extension contains the environmental and measurement information and data of each occurrence. This extension is also linked to the Event core using the **eventID**, and linked to the Occurrence extension table using the **occurrenceID**. The various measurements are populated with **measurementID**, **measurementType**, **measurementTypeID**, **measurementUnit**, **measurementUnitID**, **measurementValue**, **measurementValueID**, **measurementAccuracy**, **measurementMethod**, **measurementDeterminedBy** and **measurementDeterminedDate**. In the example dataset, the LifeWatch observatory data was compiled using imaging flow cytometry (FlowCam) to observe and identify phytoplankton in the Belgian Part of the North Sea and recorded a number of measurements including abundance, lifestages, sampling device information as well as environmental measurements such as water temperature, salinity and conductivity with accompanying vocabulary.

| id | occurrenceID | measurementType |
|---|--|--|
| TripNR3242 | TripNR3242TripStationNR16781MidasTripActionID105598 | Platform Name |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598occurrenceIDTA_105598_Actinopterychus_5 | Abundance (WORMS:148947) per unit volume of the water body by image analysis |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598occurrenceIDTA_105598_Actinopterychus_5 | Abundance (WORMS:148948) per unit volume of the water body by image analysis |

| id | occurrenceID | measurementType |
|---|---|--|
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598 | LifeStage_TA_105598_(Pseudo-)pedastrum_5 |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598 | LifeStage_TA_105598_Actinoptychus senarius_5 |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598 | Sampling device aperture diameter |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598 | Sampling instrument name |
| TripNR3242TripStationNR16781MidasTripActionID105598 | TripNR3242TripStationNR16781MidasTripActionID105598 | Sampling net mesh size |
| TripNR3242TripStationNR16781MidasTripActionID105598UW | TripNR3242TripStationNR16781MidasTripActionID105598UW | Conductivity of the water body |
| TripNR3242TripStationNR16781MidasTripActionID105598UW | TripNR3242TripStationNR16781MidasTripActionID105598UW | Practical salinity of the water body |
| TripNR3242TripStationNR16781MidasTripActionID105598UW | TripNR3242TripStationNR16781MidasTripActionID105598UW | Temperature of the water body |

| measurementTypeID | measurementValue | measurementValueID | measurementUnit |
|---|---------------------|---|--------------------|
| http://vocab.nerc.ac.uk/collection/Q01/current/Q0100001/ | Simon Stevin | http://vocab.nerc.ac.uk/collection/C17/current/11SS/ | |
| http://vocab.nerc.ac.uk/collection/P01/current/SDBIOL01/ | 2.24 | | specimens/L |
| http://vocab.nerc.ac.uk/collection/P01/current/SDBIOL01/ | 1.12 | | specimens/L |
| http://vocab.nerc.ac.uk/collection/P01/current/LS-TAGE01/ | adult | http://vocab.nerc.ac.uk/collection/S11/current/S1116/ | |
| http://vocab.nerc.ac.uk/collection/P01/current/LS-TAGE01/ | adult | http://vocab.nerc.ac.uk/collection/S11/current/S1116/ | |
| http://vocab.nerc.ac.uk/collection/Q01/current/Q0100012/ | 0.4 | | meter |
| http://vocab.nerc.ac.uk/collection/Q01/current/Q0100002/ | Planktonnet Apstein | http://vocab.nerc.ac.uk/collection/L22/current/TOOL0978/ | |
| http://vocab.nerc.ac.uk/collection/Q01/current/Q0100015/ | 55 | | micrometer |
| http://vocab.nerc.ac.uk/collection/P01/current/CNDCZZ01/ | 3.916 | | Siemens per metre |
| http://vocab.nerc.ac.uk/collection/P01/current/PSALPR01/ | 34.295 | | Grams per kilogram |
| http://vocab.nerc.ac.uk/collection/P01/current/TEMPPR01/ | 11.881 | | Degrees Celsius |

| measurementUnitID | measurementDeterminedBy | measurementMethod |
|---|---------------------------|--|
| http://vocab.nerc.ac.uk/collection/P06/curren/UCPL | Flanders Marine Institute | identified and counted by image analysis and normalised to a unit volume of water body, validated by human |
| | Flanders Marine Institute | |
| | Flanders Marine Institute | |
| | Flanders Marine Institute | |
| | Flanders Marine Institute | |
| http://vocab.nerc.ac.uk/collection/P06/curren/ULAA/ | Flanders Marine Institute | identified and counted by image analysis and normalised to a unit volume of water body, validated by human |
| | Flanders Marine Institute | |
| | Flanders Marine Institute | |
| http://vocab.nerc.ac.uk/collection/P06/curren/UMIC/ | Flanders Marine Institute | Electrical conductivity of the water body by thermosalinograph, based on the UnderWaySystem of the ship |
| | Flanders Marine Institute | |
| http://vocab.nerc.ac.uk/collection/P06/curren/UECA | Flanders Marine Institute | Practical salinity of the water body based on water from the UnderWaySystem of the ship |
| http://vocab.nerc.ac.uk/collection/P06/curren/UGKG/ | Flanders Marine Institute | |
| http://vocab.nerc.ac.uk/collection/P06/curren/UPAA/ | Flanders Marine Institute | |

The structure of the Event, Occurrence and extendedMeasurementOrFact extensions for Seagrass Cover & Composition is based on community feedback organised through the the Scientific Committee on Oceanic Research (SCOR): [Coordinated Global Research Assessment of Seagrass System \(C-GRASS\)](#). We acknowledge the work that the C-grass SCOR work group has done to develop a proposed scheme for completing Seagrass related extension files.

Event core:

The Event core table is created by extracting all events and attributes. All events are linked together using **eventID** and **parentEventID**. **eventDate** is populated at the transect level with the recommended format that conforms to ISO 8601-1:2019. **habitat** is populated as a category or description of the habitat in which the event occurred. Additional **fieldNotes** can also be provided if applicable. The recommended best practice for **countryCode** is to use an ISO 3166-1-alpha-2 country code. The remaining Event core fields comprise of loca-

tion data including `maximumDepthInMeters`, `minimumDepthInMeters`, `decimalLongitude`, `decimalLatitude`, `coordinateUncertaintyInMeters`, `footprintWKT` and `footprintSRS`. Additionally in the Event core, it is recommended to further include information regarding `license`, `rightsHolder`, `bibliographicCitation`, `institutionID`, `datasetID`, `institutionCode` and `datasetName`.

| eventID | parentEventID | eventDate | habitat | fieldNotes | countryCode |
|--|--------------------------|------------|----------|------------|-------------|
| USBsg-chengue-pastocoral | | 2019-05-13 | seagrass | no notes | CO |
| USBsg-chengue-pastomanglar | | 2019-05-14 | seagrass | no notes | CO |
| USBsg-chengue-pastocoral-SquidPopTransect1 | USBsg-chengue-pastocoral | 2019-05-13 | seagrass | no notes | CO |
| USBsg-chengue-pastocoral-SquidPopTransect2 | USBsg-chengue-pastocoral | 2019-05-13 | seagrass | no notes | CO |

| minimumDepthInMeters | maximumDepthInMeters | decimalLatitude | decimalLongitude | coordinateUncertaintyInMeters | footprintWKT | footprintSRS |
|----------------------|----------------------|-----------------|------------------|-------------------------------|---|--------------|
| 0.8 | 2 | 11.32021806 | -74.12753684 | 10 | POLYGON ((-74.1273259763024 11.320475512862,-74.1272978004008 11.3201655779439)) | EPSG:4326 |
| 0.8 | 0.8 | 11.31977189 | -74.12536879 | 10 | POLYGON ((-74.1253370891273 11.3195001294432,-74.1253337743154 11.3194968146313)) | EPSG:4326 |
| 0.8 | 2 | 11.32039927 | -74.12737404 | 50 | POINT (-74.1273740410759 11.3203992721869) | EPSG:4326 |
| 0.8 | 2 | 11.32027662 | -74.1273989 | 50 | POINT (-74.1273989021655 11.3202766241445) | EPSG:4326 |

Occurrence extension:

The Occurrence extension table contain data for each occurrence with an `occurrenceID` and is linked to the Event core with the `eventID`. This table should provide information on the `basisOfRecord` and `occurrenceStatus`. Scientific names and links to the World Register of Marine Species should be provided under `scientificName` and `scientificNameID`, respectively. If a species was identified by an expert, the field `identifiedBy` can be populated. If the species is well-known by another common name, this name can be provided under `vernacularName`.

| eventID | occurrenceID | basisOfRecord | occurrenceStatus | scientificNameID | scientificName |
|--|-----------------------------------|------------------|------------------|--|------------------------|
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | HumanObservation | present | urn:lsid:marinespecies.org:taxname:374720 | Thalassia testudinum |
| USBsg-chengue-pastomanglar | USBsg-chengue-manglar-tt | HumanObservation | present | urn:lsid:marinespecies.org:taxname:374720 | Thalassia testudinum |
| USBsg-chengue-pastocoral-SquidPopTransect1 | USBsg-chengue-pastocoral-fish-001 | HumanObservation | present | urn:lsid:marinespecies.org:taxname:158815 | Halichoeres bivittatus |
| USBsg-chengue-pastocoral-SquidPopTransect1 | USBsg-chengue-pastocoral-fish-002 | HumanObservation | present | urn:lsid:marinespecies.org:taxname:158932 | Lactophrys triqueter |

extendedMeasurementOrFact (eMoF) extension:

The eMoF table contains the measurement information and data of each occurrence. This extension is also linked to the Event core using the `eventID`, and linked to the Occurrence table using the `occurrenceID`. The various measurements are populated with `measurementType`, `measurementTypeID`, `measurementUnit`, `measurementUnitID`, `measurementValue`, `measurementValueID`, `measurementAccuracy`, `measurementMethod`, `measurementDeterminedBy` and `measurementDeterminedDate`. The example dataset of [Seagrass Monitoring at Chengue Bay, Colombia](#) recorded a number of measurements and can be used as an example of how to populate the respective fields:

| eventID | occurrenceID | measurementID | measurementType |
|--------------------------|-----------------------------|---|---------------------------------------|
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-PhyQ01 | WaterTemp |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-PhyQ02 | Salinity |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-PhyQ03 | Dissolved oxygen |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1C1-shoot-01 | Shoot Density |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1C1-leafLength-01 | Leaf Length |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1N1-dryBiomass | Total Dry Biomass |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1N1-biomassGL | Dry biomass of green leaves |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1N1-biomassNGL | Dry biomass of non green leaves |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1N1-biomassSH | Dry biomass of the shoots |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1N2-biomassR | Dry biomass of the roots |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1N2-biomassRIZ | Dry biomass of the rizome |
| USBsg-chengue-pastocoral | USBsg-chengue-pastocoral-tt | USBsg-chengue-pastocoral-T1N2-biomassOTH | Dry biomass of other seagrass species |

| measurementTypeID | measurementValue | measurementUnit | measurementUnitID |
|---|------------------|-------------------------|---|
| http://vocab.nerc.ac.uk/collection/P01/current/TE | 29.23 | Degrees Celsius | http://vocab.nerc.ac.uk/collection/P06/current/UPAA/ |
| http://vocab.nerc.ac.uk/collection/P01/current/SSAL | 36 | Parts per thousand | http://vocab.nerc.ac.uk/collection/P06/current/UPPT/ |
| http://vocab.nerc.ac.uk/collection/P01/current/DO | 6.58 | Milligrams per litre | http://vocab.nerc.ac.uk/collection/P06/current/UMGL/ |
| http://vocab.nerc.ac.uk/collection/P01/current/SDBI | 128 | Number per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UPMS/ |
| http://vocab.nerc.ac.uk/collection/P01/current/OB | 18 | Centimetres | http://vocab.nerc.ac.uk/collection/P06/current/ULCM/ |
| http://vocab.nerc.ac.uk/collection/S06/current/S0600087/ | 0.32055 | Grams per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UGMS/ |
| http://vocab.nerc.ac.uk/collection/S06/current/S0600087/ | 0.05575 | Grams per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UGMS/ |
| http://vocab.nerc.ac.uk/collection/S06/current/S0600087/ | 0.1469 | Grams per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UGMS/ |
| http://vocab.nerc.ac.uk/collection/S06/current/S0600087/ | 0.07625 | Grams per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UGMS/ |
| http://vocab.nerc.ac.uk/collection/S06/current/S0600087/ | 0.0385 | Grams per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UGMS/ |
| http://vocab.nerc.ac.uk/collection/S06/current/S0600087/ | 0.02725 | Grams per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UGMS/ |
| http://vocab.nerc.ac.uk/collection/S06/current/S0600087/ | 0 | Grams per square metre | http://vocab.nerc.ac.uk/collection/P06/current/UGMS/ |

3.9.3.13 Zooplankton biomass & diversity

Here we will encode zooplankton observation and environmental data into Darwin Core. Extracts from the actual dataset [LifeWatch observatory data: zooplankton observations by imaging \(ZooScan\) in the Belgian Part of the North Sea](#), are used as an example.

Event core:

The Event core contains events at the different levels and are linked together with `eventID` and `parentEventID`. In this example, the dataset contains records pointing to the origin, the in-situ sampling position as well as a record referring to the ex-situ collection of living specimens. In this case, the the event type information is provided in `type`. The recommended practice for providing the countryCode is to use an ISO 3166-1-alpha-2 country code. If additional information regarding licencing is provided, these can be populated under `rightsHolder` and `accessRights`. The remaining Event core fields provide location data including `datasetID` and `datasetName`, `locationID`, `waterBody`, `maximumDepthInMeters`, `minimumDepthInMeters`, `decimalLongitude`, `decimalLatitude`, `coordinateUncertaintyInMeters`, `geodeticDatum` and `footprintSRS`.

| eventID | parentEventID | eventRemarks | eventDate | modified |
|--|---------------|--------------|---|---------------------|
| TripNR2547 | | cruise | 2013-07-22T06:58:00+00:00/2013-07-22T16:58:00+00:00 | 2021-06-23 14:54:00 |
| TripNR2547TripStationNR9781 | TripNR2547 | stationVisit | 2013-07-22T07:13:00+00:00/2013-07-22T07:26:00+00:00 | 2021-06-23 14:54:00 |
| TripNR2547TripStationNR9781MidasTripActionID280342547TripStationNR9781 | | sample | 2013-07-22T07:22:00+00:00 | 2021-06-23 14:54:00 |
| TripNR2547TripStationNR9781MidasTripActionID280342547TripStationNR9781 | | sample | 2013-07-22T07:22:00+00:00 | 2021-06-23 14:54:00 |

| datasetID | datasetName | locationID | waterBody | country |
|---|---|------------|-------------------------------|---------|
| https://marineinfo.org/id/dataset/4687 | LifeWatch observatory data: zooplankton observations... | 130 | Belgian Part of the North Sea | Belgium |
| https://marineinfo.org/id/dataset/4687 | LifeWatch observatory data: zooplankton observations... | 130 | | |
| https://marineinfo.org/id/dataset/4687 | LifeWatch observatory data: zooplankton observations... | 130 | | |
| https://marineinfo.org/id/dataset/4687 | LifeWatch observatory data: zooplankton observations... | 130 | | |

| minimumDepthInMeters | maximumDepthInMeters | decimalLatitude | decimalLongitude | geodeticDatum | footprintSRS |
|----------------------|----------------------|-----------------|------------------|---------------|--------------|
| 0 | 13.4 | 51.27083333 | 2.905 | EPSG:4326 | EPSG:4326 |
| 0 | 0 | 51.2687318 | 2.901797 | EPSG:4326 | EPSG:4326 |
| 3 | 3 | 51.2687318 | 2.901797 | EPSG:4326 | EPSG:4326 |

Occurrence extension:

The Occurrence extension contains data of each occurrence with an `occurrenceID` and is linked to the Event core with the `eventID`. The Occurrence extension should provide information on the `basisOfRecord` and `occurrenceStatus`. Scientific names and links to the World Register of Marine Species should be provided under `scientificName` and `scientificNameID`, respectively.

| eventID | occurrenceID |
|---|--|
| TripNR2547TripStationNR9781MidasTripActionID23024 | TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Amphipoda_sub2_130 |
| TripNR2547TripStationNR9781MidasTripActionID23024 | TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Annelida_sub2_130 |
| TripNR2547TripStationNR9781MidasTripActionID23024 | TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Anomura_sub2_130 |
| TripNR2547TripStationNR9781MidasTripActionID23024 | TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Appendicularia_sub2_130 |

| modified | basisOfRecord | occurrenceStatus | scientificNameID | scientificName |
|------------|---------------|------------------|---|----------------|
| 2021-06-22 | Occurrence | absent | urn:lsid:marinespecies.org:taxname:1135 | Amphipoda |
| 2021-06-22 | Occurrence | present | urn:lsid:marinespecies.org:taxname:882 | Annelida |
| 2021-06-22 | Occurrence | absent | urn:lsid:marinespecies.org:taxname:106671 | Anomura |
| 2021-06-22 | Occurrence | absent | urn:lsid:marinespecies.org:taxname:146421 | Appendicularia |

extendedMeasurementOrFact (eMoF) extension:

The eMoF extension table contains the measurement information and data of each occurrence. This extension is also linked to the Event core using the `eventID`, and linked to the Occurrence table using the `occurrenceID`. The various measurements are populated with `measurementType`, `measurementTypeID`, `measurementUnit`, `measurementUnitID`, `measurementValue`, `measurementValueID`, `measurementAccuracy`, `measurementMethod`, `measurementDeterminedBy` and `measurementDeterminedDate`. The example dataset of [LifeWatch observatory data: zooplankton observations by imaging \(ZooScan\) in the Belgian Part of the North Sea](#) recorded some ENV-DATA and organism measurements the can be used as an example of how to populate the respective fields, including conductivity of the water body; concentration of chlorophyll-a per unit volume of the water body; sampling instrument name; sampling net mesh size; lifestage of the organism observed; and abundance of the organism observed.

| id | occurrenceID | measurementType |
|--|--|--|
| TripNR3256TripStationNR17157MidasTripActionID106326 | TripNR3256TripStationNR17157MidasTripActionID106326 | Sampling instrument name |
| TripNR3256TripStationNR17157MidasTripActionID106326 | TripNR3256TripStationNR17157MidasTripActionID106326 | Sampling net mesh size |
| TripNR3529TripStationNR19242MidasTripActionID109631UW | TripNR3529TripStationNR19242MidasTripActionID109631UW | Conductivity of the water body |
| TripNR3529TripStationNR19243MidasTripActionID109634 | TripNR3529TripStationNR19243MidasTripActionID109634 | Concentration of chlorophyll-a per unit volume of the water body |
| TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Annelida_sub2_130 | TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Annelida_sub2_130 | Conductivity of the water body |
| TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Annelida_sub2_130 | TripNR2547TripStationNR9781MidasTripActionID23024occurrenceIDTA23024_Annelida_sub2_130 | Concentration of chlorophyll-a per unit volume of the water body by image analysis |

| measurementTypeID | measurementValue | measurementValueID | measurementUnit |
|---|------------------|---|--------------------------|
| http://vocab.nerc.ac.uk/collection/Q01/current/Q010002/ | Planktonnet WP2 | http://vocab.nerc.ac.uk/collection/L22/current/TOOL0979/ | micrometer |
| http://vocab.nerc.ac.uk/collection/Q01/current/Q010015/ | 200 | | |
| http://vocab.nerc.ac.uk/collection/P01/current/CNDCZZ01/ | 4.05 | | Siemens per metre |
| http://vocab.nerc.ac.uk/collection/P01/current/CPHLHPP1/ | 1.42 | | Micrograms per litre |
| http://vocab.nerc.ac.uk/collection/P01/current/LSTAGE01/ | unspecified | http://vocab.nerc.ac.uk/collection/S11/current/S1152/ | |
| http://vocab.nerc.ac.uk/collection/P01/current/SDBIOL01/ | 0.50 | | specimens/m ³ |

| measurementUnitID | measurementDeterminedBy | measurementMethod |
|---|---------------------------|--|
| http://vocab.nerc.ac.uk/collection/P06/current/UMIC/ | Flanders Marine Institute | Electrical conductivity of the water body by thermosalinograph, based on the UnderWaySystem of the ship |
| http://vocab.nerc.ac.uk/collection/P06/current/UECA/ | Flanders Marine Institute | Concentration of chlorophyll-a per unit volume of the water body [particulate >GF/F phase] by filtration, acetone extraction and high performance liquid chromatography (HPLC) |
| http://vocab.nerc.ac.uk/collection/P06/current/UGPL/ | Flanders Marine Institute | identified and counted by image analysis and normalised to a unit volume of water body, validated by human |
| http://vocab.nerc.ac.uk/collection/P06/current/UPML/ | Flanders Marine Insitute | identified and counted by image analysis and normalised to a unit volume of water body, validated by human |

Chapter 4

Data quality control

OBIS ignores records that do not meet a number of standards. For example, all species names need to be matched against an authoritative taxonomic register, such as the World Register of Marine Species. In addition, quality is checked against the OBIS required fields as well as against any impossible values. OBIS checks, rejects and reports the data quality back to the OBIS nodes, but never change records. The OBIS tier 2 nodes are responsible for the data quality and communicate errors back to the data providers. A number of QC tools are developed to help data providers and OBIS nodes:

- QC tool for species names
- QC tool for geography and data format

4.0.1 How To Use MoF Report and Tool

A MEASUREMENT TYPES dataset report has been added regarding currently used measurementType and associated measurementTypeID(s), located near the bottom of the individual dataset pages (if measurementType in use for the dataset).

This new dataset report was derived from this MoF statistics report <https://r.obis.org/mof/> and this active filtering MoF tool <https://mof.obis.org/>.

To more easily locate the datasets within your node that may have possible measurementType ID issues, use the MoF Statistics page: <https://r.obis.org/mof/>. This contains the list of Nodes currently using measurementType/measurementValue/measurementUnit with counts and percentage missing for the associated ID(s).

If there is a node in that list that you are interested in locating, searching for and possibly fixing MoF issues, select the Node from the list, then select a dataset (displaying a high percentage of missing ID(s)), and scroll down to the MEASUREMENT TYPE report

Example, selected OBIS USA,

then selected Florida Keys Reef Visual Census 1994, and scrolled down to MEASUREMENT TYPES section:

To locate other datasets using these MEASUREMENT TYPES, use this active filtering MoF tool <https://mof.obis.org/>, sort by measurementType (click column header) and scroll to measurementType(s) of interest

For MEASUREMENT TYPE “Number of species observed during time period” has only one entry, which is missing associated ID. To see which datasets are using the listed measurementType, measurementTypeID combination, click on the number of records which is the last column.

All are from OBIS USA.

For MEASUREMENT TYPE “fish length” . . . To see which datasets are using this also listed measurementType, measurementTypeID combination, click on the number of records which is the last column.

There are two records for fish length, one missing an ID and the other using S06, which may not be the preferred ID for this measurementType:

Also, while scrolling through this report, you may notice something you would like to further research, click the record count value to see a list of datasets and associated node(s) using this noted type/ID. NOTE: Current USE does not indicate CORRECT use:

To see BODC label for the provided ID, click the Find button, second last column:

This is showing a different label from the (variety of) measurementType provided.

To see which datasets are using a specific measurementType / ID combination, click the records count, last column:

Things you are looking to clean up:

- If measurementTypeID is empty this should be updated.
- If the same measurementType (with same meaning/purpose) is using multiple measurementTypeIDs, these should be fixed to a single, preferred BODC vocab value.

4.1 Data quality flags

OBIS performs a number of quality checks on the data it receives. Records may be rejected if the quality does not meet certain expectations. In other cases quality flags are attached to the occurrence records. The checks we perform as well as the associated flags are documented [here](#).

There are several ways to inspect the quality flags associated with a specific dataset or any other subset of data. Data downloaded through the mapper and the R package will include a column named **flags** which contains a comma separated list of flags for each record. In addition, the data quality panel on the dataset and node pages has a flag icon which can be clicked to get an overview of all flags and the number of records affected.

This table includes quality flags, but also annotations from the WoRMS annotated names list. When OBIS receives a scientific name which cannot be matched with WoRMS automatically, it is sent to the WoRMS team. The WoRMS team will then annotate the name to indicate if and how the name can be fixed. Documentations about these annotations will be added here soon.

Clicking any of these flags will take you to a table showing the affected records. For example, this is a list of records from a single dataset which have the **no_match** flag, indicating that no LSID or an invalid LSID was provided, and the name could not be matched with WoRMS. The column **originalScientificName** contains the problematic names, as **scientificName** is used for the matched name.

At the top of the page there’s a button to open the occurrence records in the mapper where they can be downloaded as CSV. The occurrence table also has the **flags** column, so when inspecting non matching names for example it’s easy to check if the names at hand have any WoRMS annotations:

Inspecting flags using R is also very easy. The example below fetches the data from a single dataset, and lists the flags and the number of records affected. Notice that the **occurrence()** call has **dropped = TRUE** to make sure that any dropped records are included in the results:

```
library(robis)
library(tidyr)
library(dplyr)

# fetch all records for a dataset
```

```
df <- occurrence(datasetid = "f3d7798e-7bf2-4b85-8ed4-18f2c1849d7d", dropped = TRUE)

# unnest flags

df_long <- df %>%
  mutate(flags = strsplit(flags, ",")) %>%
  unnest(flags)

# get frequency per flag

data.frame(table(df_long$flags))
```

| | Var1 | Freq |
|----|-----------------------------------|------|
| 1 | depth_exceeds_bath | 78 |
| 2 | no_accepted_name | 17 |
| 3 | no_depth | 5 |
| 4 | no_match | 138 |
| 5 | not_marine | 2 |
| 6 | on_land | 1 |
| 7 | worms_annotation_await_editor | 5 |
| 8 | worms_annotation_reject_ambiguous | 2 |
| 9 | worms_annotation_reject_habitat | 2 |
| 10 | worms_annotation_todo | 9 |
| 11 | worms_annotation_unresolvable | 7 |

This second example creates a list of annotated names for a dataset:

```
library(robis)
library(dplyr)
library(stringr)

# fetch all records for a dataset

df <- occurrence(datasetid = "f3d7798e-7bf2-4b85-8ed4-18f2c1849d7d", dropped = TRUE)

# only keep WoRMS annotations and summarize

df %>%
  select(originalScientificName, flags) %>%
  mutate(flags = strsplit(flags, ",")) %>%
  unnest(flags) %>%
  filter(str_detect(flags, "worms")) %>%
  group_by(originalScientificName, flags) %>%
  summarize(records = n())
```

| | originalScientificName <chr> | flags <chr> | records <int> |
|---|-----------------------------------|-----------------------------------|------------------|
| 1 | Alcyonidium fruticosum | worms_annotation_reject_habitat | 1 |
| 2 | Apicularia (Thapsiella) rudis sp. | worms_annotation_unresolvable | 1 |
| 3 | Arcoscalpellum vegae | worms_annotation_unresolvable | 1 |
| 4 | Balanus evermanni | worms_annotation_await_editor | 1 |
| 5 | Chloramidae | worms_annotation_reject_ambiguous | 2 |
| 6 | Cleippides quadridentatus | worms_annotation_todo | 1 |
| 7 | Enhydrosoma hoplacantha | worms_annotation_reject_habitat | 1 |

| | | | |
|----|---------------------------|-------------------------------|---|
| 8 | Hippomedon setosa | worms_annotation_unresolvable | 1 |
| 9 | Leionucula tenuis | worms_annotation_await_editor | 1 |
| 10 | Ophiecten borealis | worms_annotation_todo | 1 |
| 11 | Ophiopholis gracilis | worms_annotation_todo | 1 |
| 12 | Priapulius australis | worms_annotation_await_editor | 1 |
| 13 | Primnoella residuaeformis | worms_annotation_unresolvable | 1 |
| 14 | Robulus orbigny | worms_annotation_unresolvable | 1 |
| 15 | Tetraxonia | worms_annotation_unresolvable | 2 |
| 16 | Tmetonyx barentsi | worms_annotation_await_editor | 2 |
| 17 | Triaxonida | worms_annotation_todo | 6 |

4.1.1 Name Matching Strategy for taxonomic quality control

Three authoritative taxonomic lists are currently used in OBIS: the World Register of Marine Species (WoRMS), the Integrated Taxonomic Information System (ITIS), and the Catalogue of Life (CoL). The Interim Register of Marine and Nonmarine Genera (IRMNG) is used to distinguish marine from freshwater species.

The OBIS node managers agreed to match all the scientific names in their datasets according to the following Name Matching workflow.

4.1.1.1 Step 1: Match with WoRMS

The taxon match tool of the World Register of Marine Species (WoRMS) is available at <http://www.marinespecies.org/aphia.php?p=match>. The WoRMS taxon match will compare your taxon list to the taxa available in WoRMS.

This taxon match takes into account exact matches and fuzzy matches, the latter being possible spelling variations of a name available in WoRMS. WoRMS also identifies ambiguous matches, indicating that several matching options are available. The user can check these ambiguous matches and select the correct one, based on e.g. the general group information (a sponge dataset) or the authority. If this would be impossible with the available information (e.g. missing authority or very diverse dataset), then you need to contact the data provider for clarification.

For performance reasons, the limit is set to 5,000 rows. Larger files can be sent to info@marinespecies.org and will be returned as quickly as possible.

After matching, the tool will return you a file with the AphiaIDs, LSIDs, valid names, authorities, classification and any other output you have selected.

The WoRMS LSID is used for `DwC:scientificNameID`.

A complete online manual is available at <http://www.marinespecies.org/tutorial/taxonmatch.php>.

4.1.1.2 Step 2: Match with other registers

The **LifeWatch taxon match** compares your taxon list to multiple taxonomic standards. Matching with multiple registers gives an indication of the correct spelling of a name, regardless of its environment. If a name would not appear in any of the registers, this could indicate a mistake in the scientific name and the name should go back to the provider for additional checking/verification.

Contrary to the WoRMS taxon match, when several matching options are available, the LifeWatch taxon match only mentions “no exact match found, multiple possibilities” instead of listing the available options. If multiple options are available, these should be looked up and matched manually.

Currently, this web service matches the scientific names with the following taxonomic registers:

- World Register of Marine Species – WoRMS

- Catalogue of Life – CoL
- Integrated Taxonomic Information System – ITIS
- Pan-European Species-directories Infrastructure – PESI
- Index Fungorum – IF
- International Plant Names Index – IPNI
- Global Names Index - GNI
- Paleobiology Database - PaleoDB

4.1.1.3 Step 3: Is taxon marine?

The Interim Register of Marine and Non-marine Genera (IRMNG) matching services are available through <http://www.irmng.org/>, as well as through the [LifeWatch taxon match](#).

4.1.2 Geographic and data format quality control

These Data validation and QC services are available on the LifeWatch portal at <http://www.lifewatch.be/data-services>.

4.1.2.1 Geographical service

This service allows to upload a file and to plot the listed coordinates on a map. Using this web service does not require knowledge of GIS. This service allows a visual check of the available locations and makes it possible to easily identify points on land or outside the scope or study area. Geographic data are essential for OBIS and the experience is that a lot of these data is incomplete or contains errors. A visual check of the position of the sampling locations is thus a simple way of filtering out obvious errors and improving the data quality. Latitude and longitude need to be in WGS84, decimal degrees. This format is also necessary for the OBIS Schema and for uploading the dataset to IPT (Darwin Core).

4.1.2.2 OBIS data format validation

This is the most extensive check currently available and is available for data that are structured according to the OBIS Schema. This validation service checks the following items:

- Are all mandatory fields completed, what are the missing fields?
- Are the coordinates in the correct format (decimal degrees, taking into account the minimum and maximum possible values)?
- Are the sampling points on land or in water?
- Is the information in the date-fields valid (e.g. month between 1-12)?
- Can the taxon name be matched with WoRMS?

This tool undertakes several actions simultaneously. In a first step, this data service allows you to map your own column headers to the field names used in the OBIS Schema. When you then run the format validation service, the following actions are performed:

- A check of the mandatory fields of the OBIS Scheme. If mandatory fields would be missing, these will be listed separately, so you can complete them. Without these fields, the dataset cannot be accepted by the OBIS node.
- A listing of all the optional fields of the OBIS Scheme that are available in your file.
- Validation of the content of a number of fields:
- Latitude & longitude:
 - Are the values inside the world limit? (yes/no);
 - Are the values different from zero? (yes/no);
 - Are the values situated in the marine environment (sea/ocean) (=prerequisite of a marine dataset)? (yes/no)
- Date-related fields:

- Do the year-month-day fields form a valid date? (yes/no)
- Do the start- and end-date fields form a valid date? (yes/no)
- Scientific name:
 - Is the scientific name available in WoRMS? (yes/no)
 - When yes:
 - * Indication whether taxon is marine or not
 - * Indication whether taxon name is valid or not
 - * Indication of the taxonomic rank

After matching with WoRMS, the report gives a brief overview containing:

- the number of exact matches
- the number of fuzzy (=non-exact) matches
- the number of non-matches
- the number of errors that might have occurred during matching

For each of the above steps, the result report lists the number of records that passes the check. The tool also makes a ‘grand total’ of these results, indicating if the quality of record is sufficient to be imported into OBIS, taking into account the results of the above mentioned checks.

If the file contains fields that do not match the OBIS schema, these are also listed. Fields that cannot be mapped to the OBIS schema will not be uploaded in OBIS.

After this data format check, a number of columns are added to the originally uploaded file, where the results of each step are listed. Each check is basically a yes/no question, which is translated to a 1 (yes) or 0 (no) value in the results file and is thus easy to interpret.

4.2 Common Quality Control issues

4.2.1 Missing required fields

4.2.2 Uncertain temporal range

4.2.3 Uncertain geolocation

4.2.4 Uncertain taxonomic information

4.2.5 Uncertain measurements

4.2.6 Non-marine species

Chapter 5

Data publication and sharing

OBIS nodes can accept any data files from its data sources or data providers, and they publish these data on their OBIS nodes IPT, which are harvested by central OBIS. The Integrated Publishing Toolkit (IPT) is developed and maintained by the Global Biodiversity Information Facility (GBIF). GBIF maintains an [IPT manual](#). See here for specific OBIS instructions:

5.1 Add metadata

Metadata enables users to discover, assess, understand and attribute your dataset for their particular needs, so it pays off to invest some time providing them.

Go to your resource overview page > Metadata and click Edit to open the metadata editor. Any information you provide here will be visible on the resource homepage and bundled together with your data when you publish.

Follow the [OBIS metadata standards and best practices](#), or check the [IPT manual](#) for detailed instructions about the metadata editor.

5.2 Licenses

5.3 IPT Administration

Admin responsibilities

5.4 IPT

Contents

- [Introduction](#)
- [Installation](#)
- [Registration](#)
- [Publish your data](#)
- [Upload data](#)

- Map to Darwin Core
- Add metadata
- Publish your data
- Publish your data as a dataset paper

5.4.0.1 Introduction

The biodiversity datasets and its metadata are published in OBIS using the Integrated Publishing Toolkit (IPT), developed by GBIF. The IPT software assists the user in mapping data to valid Darwin Core terms and archiving and compressing the Darwin Core content with: (i) a descriptor file: `meta.xml` that maps the core and extensions files to Darwin Core terms, and describes how the core and extensions files are linked, and (ii) the `eml.xml` file, which contains the dataset metadata in **Ecological Metadata Language** (EML) format. For instructions on how to enter the metadata go to **EML**. All these components (i.e. core file, extension files, descriptor file and metadata file), compressed together (as a .zip file), comprise the Darwin Core Archive.

5.4.0.2 Installation

OBIS nodes can decide to install and manage their IPT on their own institutional servers or use (at no charge!) the OBIS servers in Oostende, Belgium, provided as in-kind by the Flanders Marine Institute (VLIZ), which also runs the European OBIS node (EurOBIS). VLIZ also ensures the IPT instances run on the latest version (important for security updates). Here is an overview of the IPT instances hosted in Oostende: <http://ipt.iobis.org/>. Please contact the secretariat at info@iobis.org if you would like OBIS to host your IPT.

To install your own IPT, please follow the instructions in the **GBIF IPT manual**.

5.4.0.3 Registration

When you have installed your IPT, please provide the IPT instance URL to the OBIS secretariat, so your IPT is included in the data harvesting process.

OBIS recommends to share the data as widely as possible including with other networks such as GBIF. On 13 October 2014, a cooperation agreement was signed between the secretariats of IOC-UNESCO/OBIS and GBIF in which the two parties recognized the two initiatives (OBIS and GBIF) as complementary with common goals (and in particular OBIS's role in Marine Biodiversity Data). Together they agreed to work towards maximizing the quantity, quality, completeness and fitness for use of marine biodiversity data, accessible through OBIS and GBIF and in particular in the development of data standards (DwC), technology (IPT), maximizing fitness for use, development of biodiversity indicators for assessments, enhance capacity through training and coordinate approaches to the global science/policy interface. At the 4th session of the OBIS Steering Group (SG-OBIS-IV, Feb 2015), it was recommended that GBIF should harvest OBIS tier 2 nodes if OBIS tier 2 nodes could also harvest marine datasets from their GBIF nodes. In this way OBIS could work directly with the entire marine community and promote its standards and best practices. It was not recommended that iOBIS set up a separate IPT for GBIF to harvest, since this would mean a duplication of effort.

In order to publish data with GBIF, the OBIS node also need to become a **data publisher in GBIF**, and link the IPT installation with this publishing organization. OBIS nodes are encouraged to use the OBIS node name as the publishers's name, unless the host institution requires its institutional name to be used. In the latter case, reference to the OBIS node can be added in the description, as well as between brackets in the title. The name of the IPT instance can also refer to the OBIS node. OBIS nodes are also encouraged to select OBIS as the endorsing organization. In this way, the OBIS node is also listed on the **OBIS page** at GBIF.

5.4.0.4 Publish your data

With regard to populating the IPT with marine data for OBIS, there are two possible approaches:

1. Manager driven: You as node manager take the responsibility of describing, checking and uploading the data and metadata to the IPT. The data provider can send you the data ‘as such’ or you can make agreements with your providers on the accepted OBIS data format and standards. This approach will give you a very good knowledge of what data is available. It can be time-consuming, as (extended) communication with the data provider will be necessary to document the metadata and to re-format the data to the OBIS standards.
2. User driven: You as node manager can guide (some of your) data providers to publish the data and metadata to the IPT themselves. Your main task will be to make sure that all relevant information and data for OBIS is available and that you perform the necessary quality checks before the data are released to OBIS. Once the Darwin Core Archive is created, the data provider should inform the node manager of this action, so he or she can do the necessary quality control checks. In order for the node manager to be able to look at the dataset, the data provider should add him or her as a “resource manager” to this specific dataset.

In most cases, there will be a combination of these two approaches. The chosen approach will largely depend on the capacity, availability and willingness of your data provider to invest extra time in formatting and thoroughly describing their data. If you – as node manager – would prefer a partly user driven approach, the following steps to publishing marine data to OBIS briefly explains how you or a data provider can upload, standardize and publish a dataset on the OBIS node IPT, without the hassle of installing and maintaining an IPT instance. The data are published in your organization’s name. This guide is based on the Canadensys 7-step guide to publishing marine data:

Desmet, P. & C. Sinou. 2012. 7-step guide to data publication. Canadensys. <http://community.canadensys.net/publication/data-publication-guide>.

:exclamation: Make sure you have obtained the rights from the data owners to publish their data!

5.4.0.4.1 Create your resource on the IPT The Integrated Publishing Toolkit (IPT), developed by GBIF, is an open source web application that can be customized by the OBIS node manager. The IPT-instance is used to publish and register all the datasets. To be able to create and manage your own dataset (called a “resource” by GBIF), you will need a user account. Contact your node manager to create one for you.

Once you have your account, login at the top of the IPT page. Click on the tab Manage resources: it will display all the datasets you are managing and will be empty at first. You can create a new resource at the bottom of the page. Follow the [GBIF IPT manual](#) for more detailed instructions. The first thing that needs to be completed is the shortname of your resource. This shortname uniquely identifies your resource (=dataset) and will eventually show up in the URL of this resource on IPT. These shortname identifiers are also used to create folders on the IPT and they cannot be changed.

We therefore advise that the shortname:

- is unique, descriptive and short (max. 100 characters)
- does not contain a space, comma, accents or special characters

Shortname good examples:

- VLIZ_benthos_NorthSea_2000
- UBC_algae_specimens
- ...

:exclamation: When you would delete a resource, please inform your node manager of this action! If you create a test-file, please include `_test` at the end of your shortname.

You can also create an entirely new resource by uploading an existing archived resource. See the IPT manual section [Upload a DwC-A](#) for instructions.

Please note the IPT has a 100MB file upload limit, however, there is no limit to the size of a Darwin Core Archive that the IPT can export/publish. Refer to the [File upload](#) section in the IPT manual, to find out how to work around the file upload limit.

Once you have created your resource, you will see an empty resource overview page.

5.4.0.5 Upload data

Uploading your source file to the IPT is easy: go to > your resource overview page > Source Data and click on Choose File. You might want to compress/zip your source file first to improve the upload speed of large files. The IPT will unzip them automatically once received. Follow the [IPT manual](#) for more detailed instructions (including the option to use multiple source files or to upload via a direct database connection). Accepted formats are delimited text files (csv, tab and files using any other delimiter), either directly or compressed as zip or gzip.

Once your source file has been uploaded correctly, a source file detail page will be shown, displaying how the IPT has interpreted your file (number of columns, rows, header rows, character encoding, delimiters, etc.). Click the preview button to verify everything is correct, click anywhere on the screen to exit the preview, then click save.

5.4.0.6 Map your data to Darwin Core

Biodiversity data are published in the [Darwin Core](#) standard. It includes a list of defined terms and allows your data to be understood and used by others. It also allows an aggregator like OBIS or GBIF to integrate your data with other datasets.

Darwin Core mapping is the process of linking the fields in your resource file with the appropriate Darwin Core terms. It is the most challenging step in publishing your data for two reasons: 1) the list of Darwin Core terms can be overwhelming, so it might be difficult to select the ones that are appropriate for your dataset, and 2) the IPT currently only allows one-to-one mapping of fields, so the ease of mapping will depend on your database structure and on the feasibility of exporting as close to Darwin Core as possible. Contact your node manager or the OBIS secretariat at info@iobis.org to guide you through the steps, review your mapping, suggest terms etc.

You can find more information regarding Darwin Core mapping in the [IPT manual](#) (including core types, extensions, auto-mapping, default values, value translation, etc.).

5.4.0.7 Publish your data

Go to your resource overview page > Published Release and click Publish. The IPT will now generate your data as Darwin Core, and combine the data with the metadata and package it as a standardized zip-file called a “Darwin Core Archive”. See the IPT manual for more details.

:exclamation: Hitting the “publish” button does not mean that your dataset is available to everyone, it is still private, with access limited to the resource managers. It will only be publicly available when you have changed Visibility > Public, and it will only be harvested by GBIF when you can Visibility > Registered. The last step is not needed for OBIS to harvest your datasets. Please do not register your dataset with GBIF if your dataset is already published in GBIF by another publisher.

Back on the resource overview page > Published Release, you can see the details of your first published dataset, including the publication date and the version number. Since your dataset is published privately, the only thing left to do is to click Visibility > Public (see the IPT manual) to make it available to everyone. Warning: please do not do this with your test dataset.

It is now listed on the IPT homepage and you can share and link to it, e.g.: <http://ipt.vliz.be/resource.do?r=kielbay70>. This would be a good time to notify any regional or thematic network you are involved in, which can also have an interest in your dataset.

Your published dataset is a static snapshot of your data and will not change until you upload an updated source file and click publish again or publish a new version (do not create a new resource). This procedure has the advantage that your dataset is always available, does not require a live internet connection to your database and can be easily shared. It also allows you to control the publication process more precisely: version 1, version 2, etc. and users are informed of how recent the data are (via the last publication date).

To view an older version of the metadata about the resource, just add the trailing parameter `&v=n` to the URL where `v` stands for “version”, and `n` gets replaced by the version number, e.g., `http://ipt.vliz.be/ilvo/resource.do?r=zoopl_bpns&v=1`. In this way, specific versions of a resource’s EML, RTF, and DwC-A files can be retrieved. Please note, the IPT’s Archival Mode must be turned on in order for old versions of DwC-A to be stored (see [Configure IPT settings](#) section of the IPT manual).

5.4.0.8 Publish your metadata as a data paper

The Metadata expressed in the EML Profile standard can also be downloaded as a Rich Text Format (RTF) file. The latter can serve as a draft manuscript for a data paper ([First database-derived ‘data paper’ published in journal](#), which can be submitted for peer-review to e.g. a [Pensoft journal](#)).

5.5 Maintaining published data

5.5.1 Adding a DOI to datasets

5.5.2 User tracking?

5.6 Simultaneous publishing to GBIF

5.6.1 Differences between OBIS and GBIF publication processes

5.7 Update your data in OBIS

Chapter 6

Data access

6.1 Mapper

- <https://mapper.obis.org>

The mapper allows users to visualize and inspect subsets of OBIS data. A variety of filters (taxonomic, geographic, time, data quality) is available and multiple layers can be combined in a single view. Layers can be downloaded as CSV files.

6.2 R package

- <https://github.com/iobis/robis>

The robis R package has been developed to facilitate connecting to the OBIS API from R. The package can be installed **from CRAN** or **from GitHub** (latest development version). The package documentation including a function reference and a **getting started vignette** is available at <https://iobis.github.io/robis/>.

6.3 API

- <https://api.obis.org/>

Both the mapper and the R package are based on the OBIS API which can be used by third party developers as well.

6.4 Full exports

- <https://obis.org/data/access/>

Full exports of the quality controlled presence records as CSV or Parquet (see below).

6.5 Finding your own data

6.6 Citing Data from OBIS

General OBIS citation:

OBIS (YEAR) Ocean Biodiversity Information System. Intergovernmental Oceanographic Commission of UNESCO. www.obis.org.

Use the following format to cite data retrieved from OBIS (dataset citations are available in the zip downloads as html file):

[Dataset citation available from metadata] [Data provider details] [Dataset] (Available: Ocean Biodiversity Information System. Intergovernmental O

For example:

Sousa Pinto, I., Viera, R. (Year: if not provided use year from dataset publication date) Monitoring of the intertidal biodiversity of rocky beaches

When data represents a subset of many datasets taken from the integrated OBIS database, you can, in addition to cite the individual datasets (and taking into account the restrictions set at each dataset level), also cite the OBIS database as follows:

OBIS (YEAR) [Data e.g. Distribution records of *Eledone cirrhosa* (Lamarck, 1798)] [Dataset] (Available: Ocean Biodiversity Information System. Inter

The derived information products from OBIS are published under the CC-0 license and can be cited as follows:

OBIS (YEAR) [Information product e.g. Global map showing the Hulbert index in a gridded view of hexagonal cells] [Map] (Available: Ocean Biodiversi

Chapter 7

Data Visualization and Analysis

7.1 Example notebooks using data from OBIS

Here are a few R notebooks showcasing the `robis` package:

- [Data exploration of wind farm monitoring datasets in OBIS](#)
- [Diversity of fish and vulnerable species in Marine World Heritage Sites based on OBIS data](#)
- [Data exploration - Stratified random surveys \(StRS\) of reef fish in the U.S. Pacific Islands](#)
- [DNADerivedData extension data access](#)
- [Canary Current LME](#)

Here are others that may be of interest:

- [Diversity indicators using OBIS data](#)
- [OBIS species richness for OSPAR](#)
- [Quality control of ISA data](#)
- [Accessing gridded data](#)

7.2 `obisindicators`: calculating & visualizing spatial biodiversity using data from OBIS

`obisindicators` is an R library developed during the [2022 IOOS Code Sprint](#). The purpose was to create an ES50 diversity index within hexagonal grids following the [diversity indicators notebook](#) by Pieter Provoost linked above. The package includes several examples, limited to 1M occurrences, that demonstrate uses of the package.

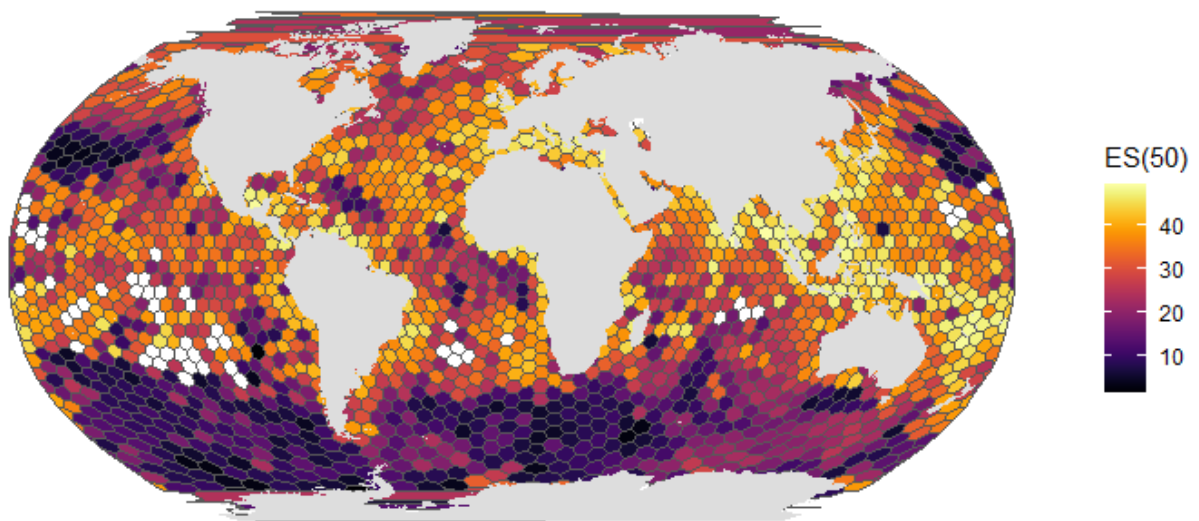


Figure 7.1: screenshot

Chapter 8

Other Resources

In this section we highlight resources created by collaborators.

8.1 MBON Pole to Pole Tutorial

- <https://www.youtube.com/watch?v=teJhfsSWonE>

This tutorial was created by the [MBON Pole to Pole project](#) to help guide people through the process of transforming datasets to Darwin Core using [tools](#) MBON Pole to Pole has developed.

8.2 IOOS Darwin Core Guide

- https://ioos.github.io/bio_data_guide/

This book contains a collection of examples and resources related to mobilizing marine biological data to the [Darwin Core standard](#) for sharing through [OBIS](#). This book has been developed by the [Standardizing Marine Biological Data Working Group \(SMBD\)](#). The working group is an open community of practitioners, experts, and scientists looking to learn and educate the community on standardizing and sharing marine biological data.

8.3 EMODnet Biology

- <https://classroom.oceanteacher.org/course/view.php?id=430>

Contributing Datasets to EMODnet Biology is a course hosted on [Ocean Teacher Global Academy \(OTGA\)](#), developed by members of the [European Marine Observation and Data Network](#). The course prepares users to format, publish, and perform quality control checks on datasets according to Darwin Core standards. While targeted at EMODnet Biology users, this course has significant overlap in how to prepare datasets for OBIS and is useful for those unfamiliar with OBIS standards. Note, an account with OTGA is required to access the course.