**Staging & Production**

The last thing steps before publishing include “staging” and “production” which includes 1) reserving a package ID number, 2) previewing your metadata (this could be cyclical and re-running the eml in R to get exactly what you want), 3) evaluating the eml and all data (generation of a large report for each table), 4) uploading the data and eml, and GOING LIVE with a DOI!!

* Familiarize yourself with the portal with this Youtube Video overview:

[https://m.youtube.com/watch?v=LSPcqTqpPMw](https://na01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fm.youtube.com%2Fwatch%3Fv%3DLSPcqTqpPMw&data=02%7C01%7C%7C7d2bcffb894a4a9cceac08d6021f6768%7Cb71d56524b834257afcd7fd177884564%7C0%7C0%7C636698731247805925&sdata=JHM083%2BaltXcj6GhIS2SC5DVgVWnRdDzFC7kvK17kxk%3D&reserved=0" \t "_blank)

* You need to contact EDI to obtain a login username and password.

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* We might want to use one login for all IEP datasets, and simply reserve new data packages.
  + User ID : iep
  + Password: iepduwg18

Feel free to contact me if you need help, 916-376-9756 or [Brittany.e.davis@water.ca.gov](mailto:Brittany.e.davis@water.ca.gov)

Updated by Rosemary Hartman Rosemary.Hartman@wildlife.ca.gov

Work in the staging environment first. Work in the staging platform to run validation checks and prepare for the DOI publication. Data is not public during the staging site.

<https://portal-s.edirepository.org/nis/home.jsp>

* The website title page will be highlighted in orange and say “**EDI Staging Environment”**
* Play around in the site for familiarity.
* You will see the package page will have a water mark

How to upload data:

1. Get a package identifier. To get a data package identifier, go to “Tools” -> “Reservations” -> “Data Package Identifier Reservations”. This will give you the number for the “package.id” value in the last line of the “make\_eml” function. You will need to add the version number to the package ID before building the EML. (example: EDI will tell you your package ID is “edi.999”, you will have to update it to “edi.999.1” for version 1.)
2. Create your metadata (see “EML Assemblyline instructions”), using the package identifier you have reserved
3. Preview your metadata “Data Packages” -> “Preview Metadata”. Choose the file you made with the EML assemplyline. It should automatically have been named with your package ID (example: edi.999.1.xml). This lets you see if you like how the metadata looks before you start uploading stuff for real.
4. Now upload your data Tools -> Evaluate/Upload Data Packages
   1. Choose EML file, click “I want to manually upload the data”, and click “Evaluate”
      1. EML file must have the first version number on it. For example, YBFMP was “eml.233” you must name the file as “eml.233.1” as it’s the first version. All version after have to increase, 2, 3, etc.
   2. Select appropriate data table files
   3. Click Evaluate
   4. Report will be generated with the # of quality checks, # valid (green), #information (blue), #warnings (orange), and #errors (red).
   5. Click “view” on report table to find out what is being flagged and if fixed are required.
      1. You can publish with warnings, but you cannot with any errors, they will need to be fixed and cycle through the steps again for “Evaluating” package. You may need to fix in EML code in R or text and data files.
5. Once you’ve cleared all the errors, hit “upload” instead of “evaluate”.
6. Your data package should now be ready, but with the “staging environment” watermark.

Work in the production platform to run final evaluation checks and upload EML and data for DOI publication. Data will be public after the “upload” step.

<https://portal.edirepository.org/nis/home.jsp>

* The website title page will be highlighted in orange and say “**EDI Data Portal”**

1. Login
2. Get a new package identifier (see above). Unfortunately, the one you got for the staging environment won’t transfer. Re-make the metadata file with the new package identifier.
3. Follow Steps 3 and 4 (above) the same as you did for the staging environment, but this time it’s for real!
4. Once report is clean and you are happy, instead of clicking evaluate, now click “upload”.
5. The completion of this will end in the live publication and DOI assignment.

