OBIS-Wan t'Knowbi

(OBIS Guide)

Contents

About this guide

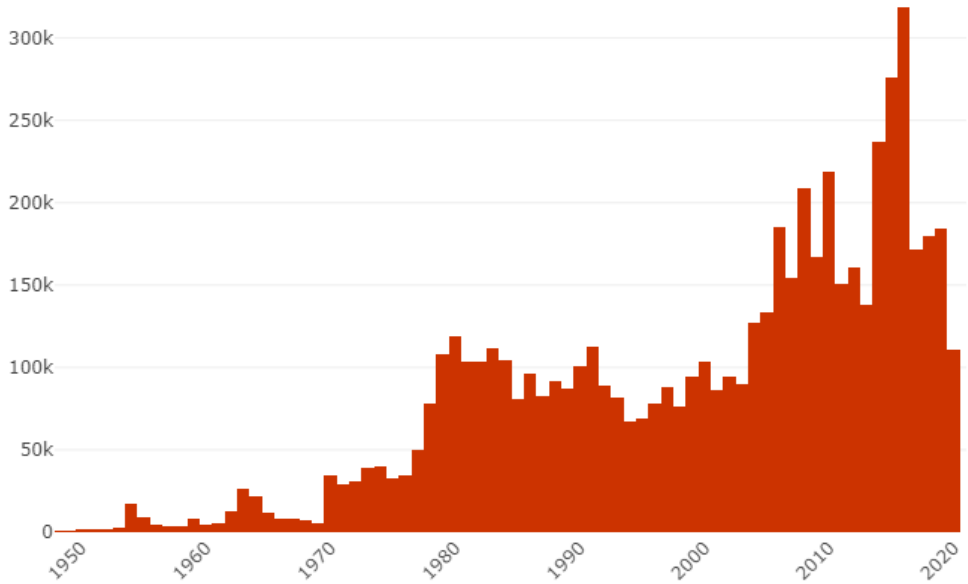
This OBIS guide was created to support the process in transforming biological data from the source to the Darwin Core Archive (DwC-A) standard and publishing to OBIS via IPT. The guide is tailored to DFO dataholders and is NOT a complete and exhaustive guide for DwC-A, IPT, or OBIS. Please see the Helpful external references section for existing complete guides.

An Introduction to OBIS

Ocean Biodiversity Information System (OBIS) is an online information system and repository where scientists can contribute and query relational data in Darwin Core Archive (DwC-A) format. The OBIS mission is to "build and maintain a global alliance that collaborates with scientific communities to facilitate free and open access to, and application of, biodiversity and biogeographic data and information on marine life". There are currently over 7.4 million occurrence records published to the OBIS Canada node from 164 datasets. Globally, more than 3,900 datasets have been shared through OBIS, representing more than 71 million occurrence records.

According to OBIS Canada, March 2021.

Records by Year



Helpful external references

OBIS Website

- OBIS Manual
- OBIS R guide
- OBIS Canada Node

Open Government (Open Canada)

Integrated Publishing Toolkit (IPT)

OBIS · GitHub

- OBIS R Resources - iobis/robis
- OBIS R tools - iobis/obistools
- IPT Manual on Github
- Bio data guide
- OBIS workshop by OTN (English)
- OBIS workshop by OTN (French)

Darwin Core (DwC) Quick Reference Guide

Standardized vocabulary – P01

Institution Code Search

OceanTeacher OBIS Course (requires a free account registration)

OBIS Slack group

Accessing data from Open Government

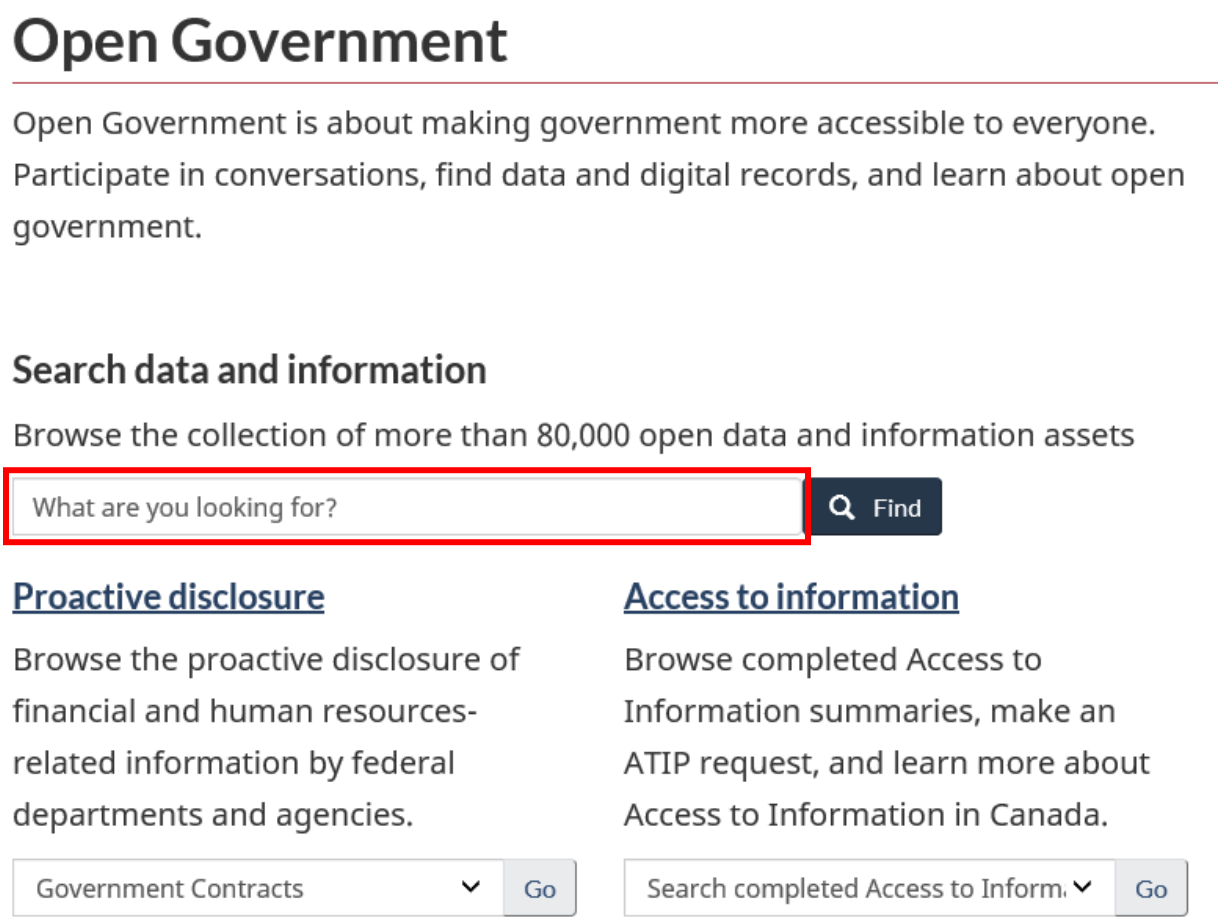
Data published on the Open Government website can readily be translated to DwC-A format for publication to OBIS Canada. Please make sure that the dataset holder/author is aware of your intent to publish their data and that they support the publication of their data to OBIS Canada. Ideally the dataset holder/author will conduct a final review of the OBIS-formatted dataset before their data is published and released to the public through OBIS Canada.

Navigating the Open Government website

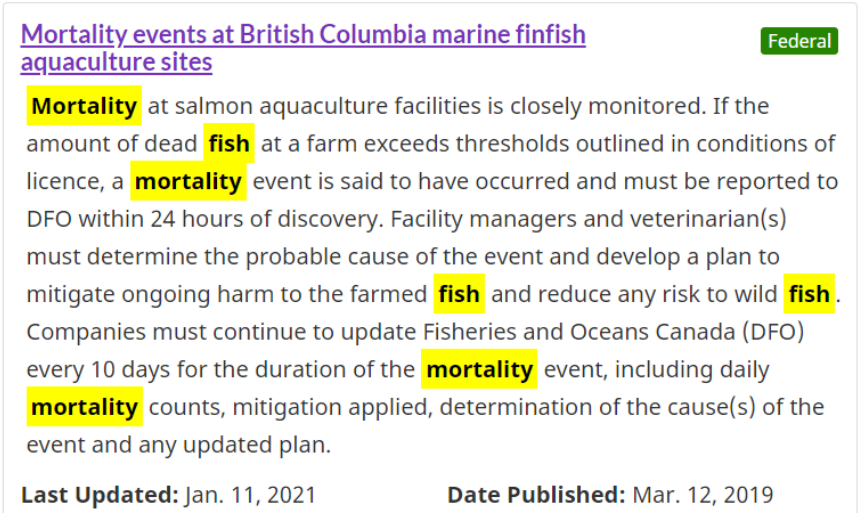
Navigate to the Open Government (www.open.canada.en). Publications to OBIS Canada MUST be published on Open Canada or have been approved to be published through Open Canada.

- Datasets vary greatly by structure and content, so one must be familiar with the OBIS standard and Darwin Core structure before translating the datasets to publish onto OBIS Canada.
- Most or all of the metadata required for OBIS Canada can be found on the Open Canada page for a specific dataset; if there are missing information, please contact the data author (data holders' contact information are listed on Open Canada).

Search for the datasets in the search bar below highlighted in the **red box**.

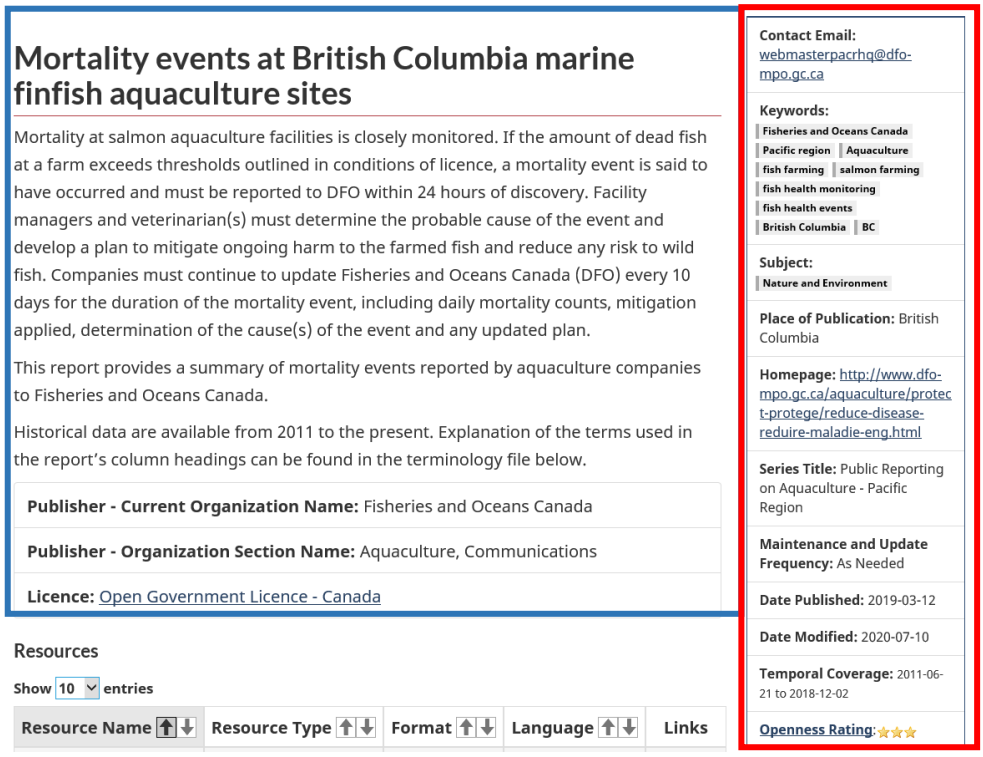


A list of databases will generate when a dataset match with the keywords highlighted in yellow. Click on the underlined title to go into the dataset page.



The dataset page displays various information about the dataset in a format similar to below:

- Contact information, keywords, and metadata.
- Summary of dataset, publishing, and rights details



Each dataset contains a list of resources similar to the example provided below that contain the dataset files and/or supplemental files associated with the dataset. Common file formats include CSV, XLS, TXT, and possible external links to where the data and supplemental files are held. An English and French version will be available to download for most datasets. As of now, we only publish datasets in *ENGLISH* onto OBIS Canada. Datasets published in French will require translation prior to OBIS publication.

Resources

Show 10 entries

Resource Name	Resource Type	Format	Language	Links
Mortality events at BC marine finfish aquaculture sites	Terminology	XLSX	English	Access
Mortality events at BC marine finfish aquaculture sites	Terminology	XLSX	French	Access
Mortality events at BC marine finfish aquaculture sites	Terminology	CSV	English	Access
Mortality events at BC marine finfish aquaculture sites	Terminology	CSV	French	Access
Mortality events at BC marine finfish aquaculture sites 2011 and ongoing	Dataset	XLSX	English	Access
Mortality events at BC marine finfish aquaculture sites 2011 and ongoing	Dataset	XLSX	French	Access
Mortality events at BC marine finfish aquaculture sites 2011 and ongoing	Dataset	CSV	English	Access
Mortality events at BC marine finfish aquaculture sites 2011 and ongoing	Dataset	CSV	French	Access

Data Translation

Dataset translation can be done with various tools, including Microsoft Excel, Microsoft Access, R, etc. This guide will provide a basic visual representation of the tables in a sample dataset. This process would vary based on which tool the user choose to use for the translation process.

Follow the links below to the full guides:
OBIS Darwin Core
OBIS R guide
Template Table from Github

Translating datasets into the Darwin Core (DwC) standard.

This step requires knowledge of the dataset and the DwC-A standards, more information can be found here:

https://obis.org/manual/darwincore/
https://dwc.tdwg.org/terms/
For taxonomic matching, please use WoRMs (jump to taxon matching)

A Darwin Core Archive (DwC-A) contains up to 4 components, which include the following:

- Core files (an Event Core and an Occurrence Core are standard for most datasets)
- Extension files (Extended Measurement or Fact or 'EMoF') - optional
- eml.xml (Ecological Metadata Language)
- meta.xml (describes the linkage between the archives)

* IPT contains a metadata editor for the datasets that is capable of compiling the eml.xml and the meta.xml files automatically from the editor so these files are not required to be created separately. Alternatively, datasets can be linked to a database provided there is another platform and infrastructure to host the database. For more information on entering metadata on IPT, jump to the metadata section.

Required column headers

The following column headers are the minimum required for the DwC-A format to be uploaded onto IPT. The absence of any one of these columns will prevent a dataset from being published on IPT.

Refer to the DwC-A Quick Reference guide for a complete list of terms by usage and file type (the navigation menu on the right will allow you to readily access definitions and examples for terms used in Event Core, Occurrence Core and EMoF files).

Column Header	Example	Details
occurrenceID	PBS-15-2	An unique identifier and Primary Key (PK) for each occurrence (row). Typically the occurrenceID is concatenated from institutionCode + collectionCode + catalogNumber. However, it can be a concatenated with other identifiers as well.
eventDate	2021-02-11	The date, in ISO 8601 standard
decimalLatitude	49.2354	Decimal latitude as spatial reference system EPSG:4326
decimalLongitude	-112.5342	Decimal longitude as spatial reference system EPSG:4326
scientificName	*Oncorhynchus tshawytscha*	The scientific name of the sample with the highest precision possible. Use originally recorded name.
scientificNameID	urn:lsid:marinespecies.org:taxname:158075	Matched from WoRMS, enter ID match of the originally recorded scientificName even if the term is no longer accepted.
occurrenceStatus	Present or Absent	Presence or absence of the taxon
basisOfRecord	HumanObservation	Based on the method of data collection; HumanObservation, PreservedSpecimen, LivingSpecimen, etc.

Sample tables

An example of each of the Event Core, Occurrence Core, and EMoF files are shown below with some common column headers. The dataset is that of a bottom trawl, where trawl catch data along with a subset of biodata are captured.

*some headers are optional depending on the dataset.
*The use of eventRemarks or occurrenceRemarks columns can be used in each of the respective event core or occurrence core files to provide additional remarks or information.

Event Core

eventID	eventDate	decimalLatitude	decimalLongitude	rightsHolder	institutionCode	institutionID	eventRemarks
R90-001	1990-07-25	48.6568	-124.9608	Her Majesty the Queen in right of	PBS	https://edmo.seadatanet.org/report/4180	Sunny

Column Header	Example	Details
eventID	R90-001	Unique identifier for the event
eventDate	1990-07-05	Date of event, in ISO 8601 YYYY-MM-DD format
decimalLatitude	48.6568	Decimal latitude
decimalLongitude	-124.9608	Decimal Longitude
rightsHolder	Her Majesty the Queen in…..	Rights holder of dataset,
institutionCode	PBS	Institution Code from EDMO
institutionID	https://edmo.seadatanet.org/report/4180	Institution ID (link) from EDMO
eventRemarks	Sunny	Remarks about the event

Occurrence

eventID	lifeStage	occurrenceID	vernacularName	ScientificName	scientificNameID	Kingdom	Phylum	Class	Order	Family	Genus	specificEpithet	occurrenceStatus	basisOfRecord
R90-001	smolt	R90-001-1	SOCKEYE SALMON	Oncorhynchus nerka	urn:lsid:marinespecies.org:t	Animalia	Chordata	Actinopterygii	Salmoniformes	Salmonidae	Oncorhynchus	nerka	present	HumanObservation
R90-001	smolt	R90-001-2	CHINOOK SALMON	Oncorhynchus tshawytscha	urn:lsid:marinespecies.org:t	Animalia	Chordata	Actinopterygii	Salmoniformes	Salmonidae	Oncorhynchus	tshawytscha	present	HumanObservation
R90-001	smolt	R90-001-3	COHO SALMON	Oncorhynchus kisutch	urn:lsid:marinespecies.org:t	Animalia	Chordata	Actinopterygii	Salmoniformes	Salmonidae	Oncorhynchus	kisutch	present	HumanObservation

Column Header	Example	Details
eventID	R90-001	Reference to the eventID
occurrenceID	R90-001-1	Unique identifier for the occurrence
lifeStage	Smolt	Life stage of the sample
vernacularName	Chum Salmon	Common name of the sample
scientificName	*Oncorhynchus keta*	Scientific name of the sample
Phylum, Class, Order, etc.	Animalia, Chordata, etc.	Taxonomic rank info for the sample
specificEpithet	keta	The second half of a species' binomial name, separated from its generic counterpart
occurrenceStatus	Present	Presence or absence of a species sample
basisOfRecord	HumanObservation	Based on method of data collection

Event EMoF

eventID	measurementType	measurementTypeID	measurementValue	measurementUnit	measurementUnitID	measurementMethod
R90-001	Distance Off Shore		2	nautical miles		Port Beam Trawl
R90-001	Duration	http://vocab.nerc.ac.u	1.0333	hours	http://vocab.nerc.ac.uk/co	Port Beam Trawl
R90-001	TowSpeed	http://vocab.nerc.ac.u	3.7	knots	http://vocab.nerc.ac.uk/co	Port Beam Trawl

Column Header	Example	Details
eventID	R90-001	Links the measurements to the taxonomic occurrence defined in the Event Core
measurementType	Duration	Type of measurement
measurementTypeID	http://vocab.nerc.ac.uk/collection/P01/current/AZDRZZ01/2/	Search the ID on NVS *Some vocabulary terms will require the introduction of a definition to NVS and the creation of an ID — it's an ever evolving system.
measurementValue	1.0333	The value of the measurement
measurementUnit	Hours	The unit of the measurement
measurementUnitID	http://vocab.nerc.ac.uk/collection/P06/current/UHOR/	Search for the ID on NVS
measurementMethod	Port Beam Trawl	Method of measurement

*Contact the OBIS Canada node manager for information on how to submit vocabulary request to NVS.

Occurrence EMoF

occurrenceID	measurementType	measurementTypeID	measurementValue	measurementUnit	measurementUnitID
2000-7-25-10-39:1	weight	http://vocab.nerc.ac.uk/collection/	0.5	Kilograms	http://vocab.nerc.ac.uk/collection
2000-7-25-10-39:2	fork length	http://vocab.nerc.ac.uk/collection/	12	millimetres	http://vocab.nerc.ac.uk/collection

Column Header	Example	Details
occurrenceID	2000-7-25-10-39:1	Links the measurements to the taxonomic occurrence defined in the Occurrence Core
measurementType	Weight	Type of measurement
measurementTypeID	http://vocab.nerc.ac.uk/collection/.....	Search the ID on NVS *Some vocabulary terms will require the introduction of a definition to NVS and the creation of an ID — it's an ever evolving system.
measurementValue	0.5	The value of the measurement

measurementUnit	Kilograms	The unit of the measurement
measurementUnitID	http://vocab.nerc.ac.uk/collection/P06/current/EFKC/	Search the ID on NVS

*Contact the OBIS Canada node manager for information on how to submit vocabulary request to NVS.

WoRMS taxonomic match

WoRMS, or the World Register of Marine Species, hosts an extensive library of marine taxa and a highly effective taxa matching tool.

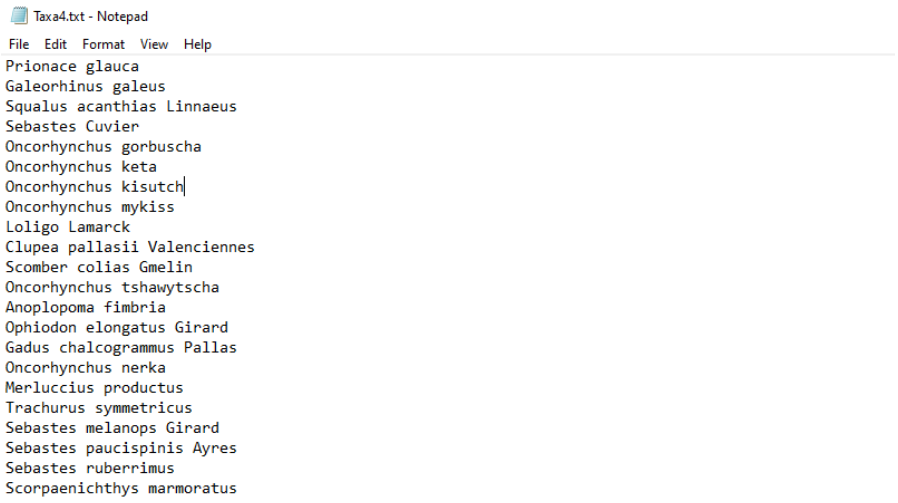
WoRMs taxa match using the web tool

To obtain complete taxonomic profiles for the species listed in your dataset, draft a simple list of scientific names in an input file in txt, csv, or xls format. Ensure that any identification qualifiers — "sp." for example — are removed from your list prior to upload.

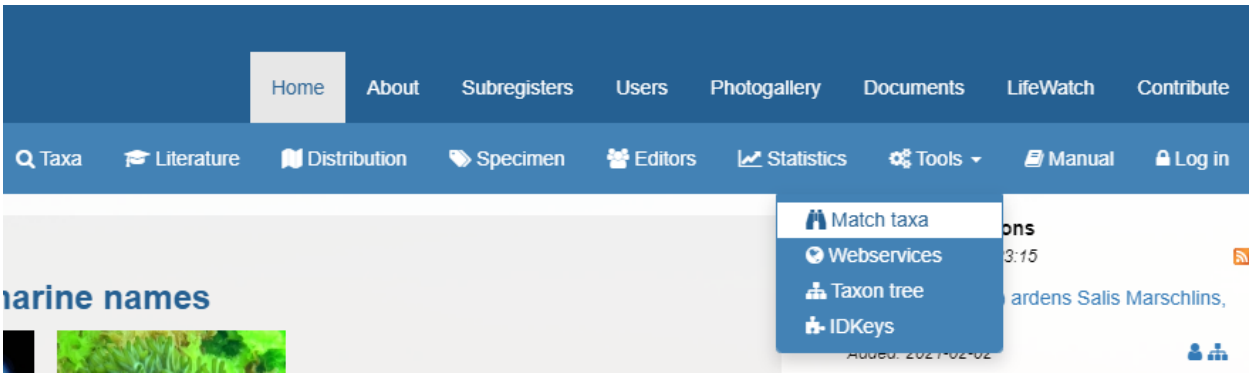
To access the WoRMs taxonomic matching tool, visit the WoRMs website, select the "Tools" dropdown and click on the "Match taxa" button.

Note: If the lowest level (species) cannot be matched, move on to the next highest level (genus, family, etc.).

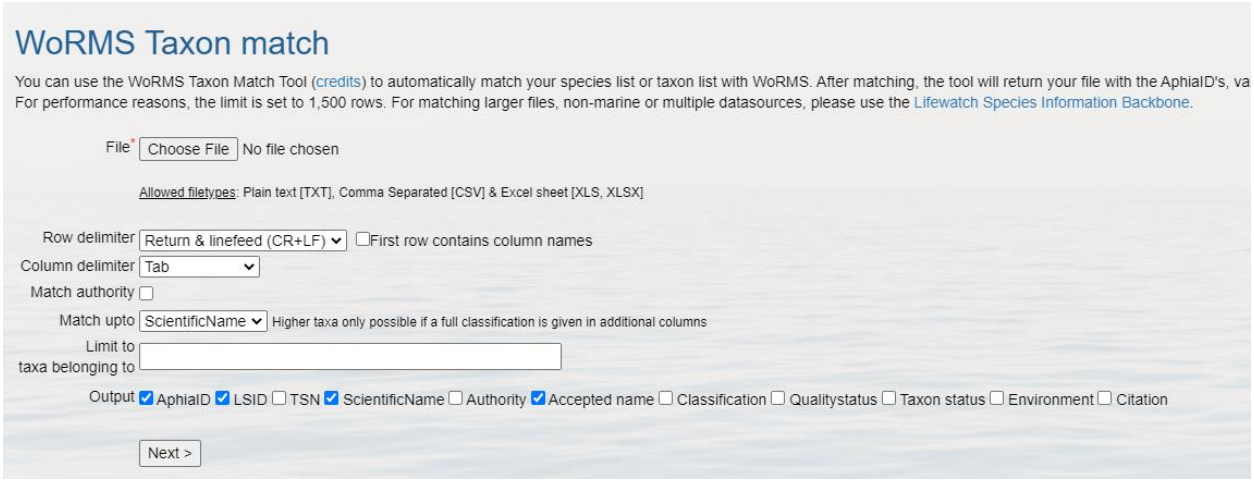
Example of an input taxa file below:



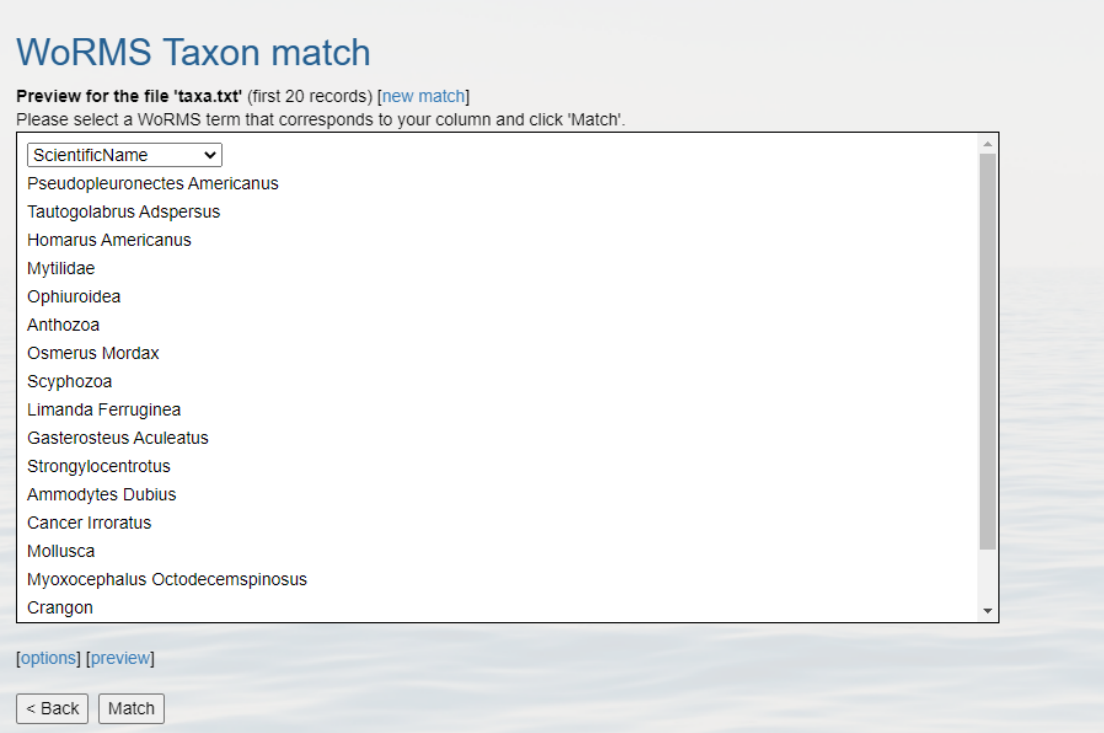
To access the WoRMs taxonomic match tool, visit the WoRMs website and select the "Tools" dropdown and click on the "Match taxa" button.



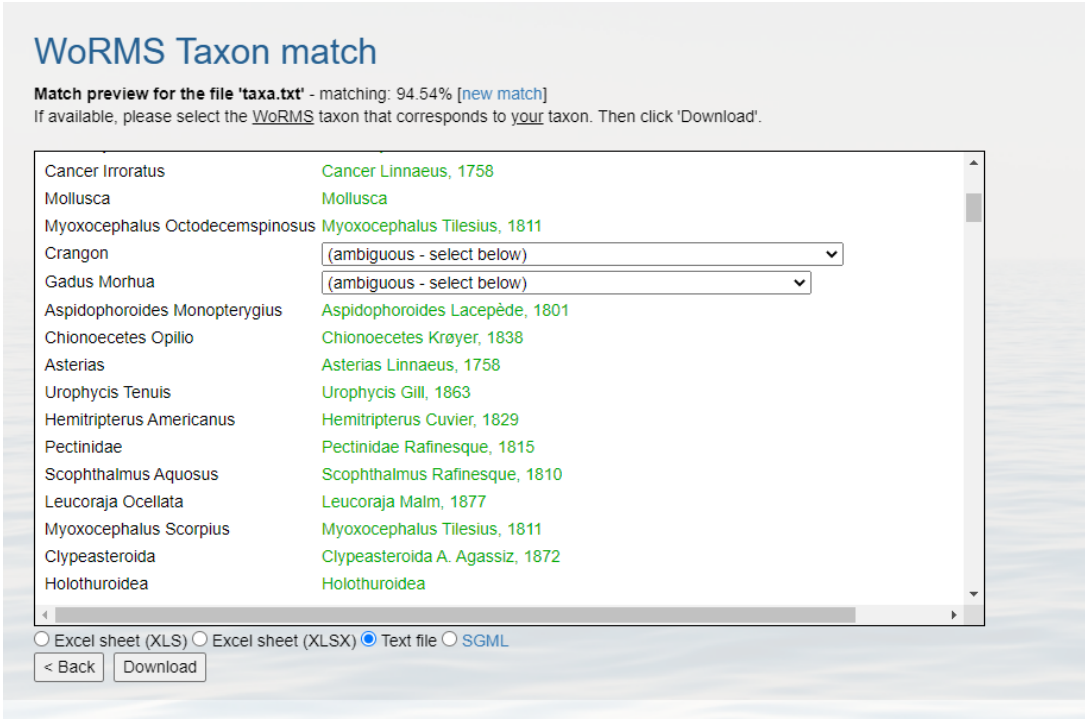
On the Match taxa page of WoRMs, select the “Choose File” button to upload the taxonomic input file. Select LSID (the IPT-compatible “scientificNameID”), Scientific Name, Authority (“scientificNameAuthorship”), Accepted name, Taxon status and Environment to include this information in your output file then click “Next >”



The WoRMS Taxon Match will read the file and prompt a column header selection for a list of scientific names.



Choose “ScientificName” from the dropdown menu and click “Match.”



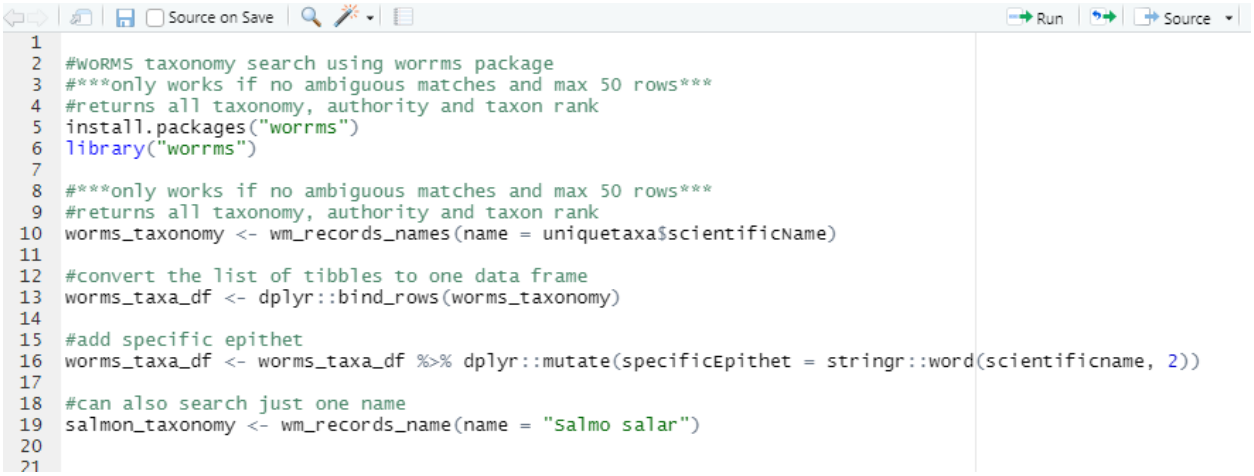
Once the match is completed, toggle your choice of output format (XLS, XLSX, TXT or SGML) and click “Download.” If an ambiguous match occurs, a drop down will appear and a selection can be made manually for each taxa.

WoRMs Taxa match using R

There are two R packages that you can use to conduct taxa matches through WoRMS: obistools and worrms.

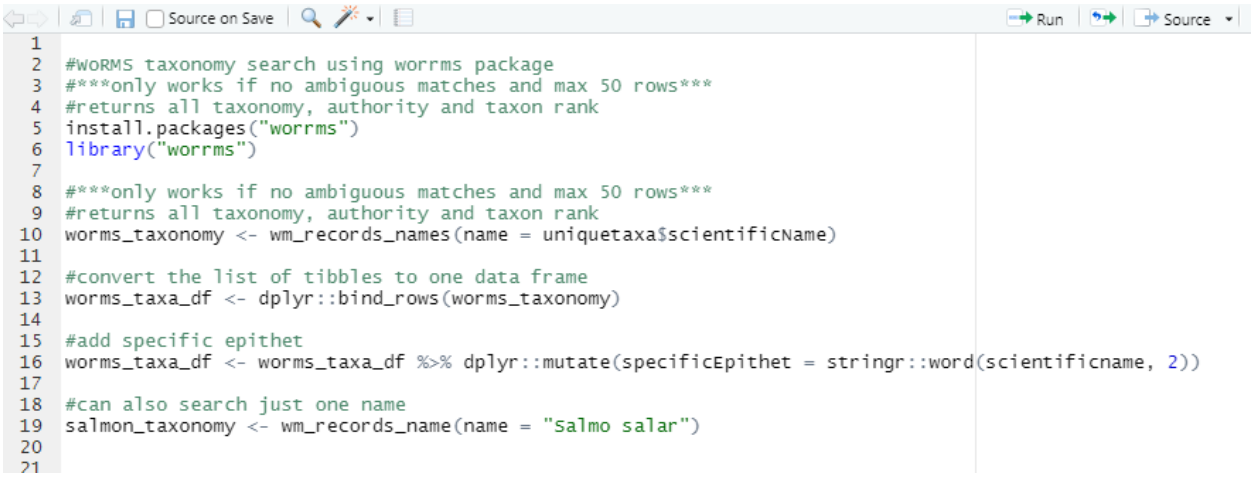
Make sure to have a list of unique taxa for your dataset before using the functions. The function match_taxa() in the obistools package only returns the LSID but can work with larger data sets. The worms_records_names() and worms_records_name() functions in the worrms package returns LSID, all taxonomy, authorship and taxon rank from the scientific name.

OBIS Tools R package:



```r

#WoRMS taxonomy search using worrms package
#***only works if no ambiguous matches and max 50 rows***
#returns all taxonomy, authority and taxon rank
install.packages("worrms")
library("worrms")

#***only works if no ambiguous matches and max 50 rows***
#returns all taxonomy, authority and taxon rank
worms_taxonomy <- wm_records_names(name = uniquetaxa$scientificName)

#convert the list of tibbles to one data frame
worms_taxa_df <- dplyr::bind_rows(worms_taxonomy)

#add specific epithet
worms_taxa_df <- worms_taxa_df %>% dplyr::mutate(specificEpithet = stringr::word(scientificname, 2))

#can also search just one name
salmon_taxonomy <- wm_records_name(name = "Salmo salar")


```

Worrms R package:



```r

#WoRMS taxonomy search using worrms package
#***only works if no ambiguous matches and max 50 rows***
#returns all taxonomy, authority and taxon rank
install.packages("worrms")
library("worrms")

#***only works if no ambiguous matches and max 50 rows***
#returns all taxonomy, authority and taxon rank
worms_taxonomy <- wm_records_names(name = uniquetaxa$scientificName)

#convert the list of tibbles to one data frame
worms_taxa_df <- dplyr::bind_rows(worms_taxonomy)

#add specific epithet
worms_taxa_df <- worms_taxa_df %>% dplyr::mutate(specificEpithet = stringr::word(scientificname, 2))

#can also search just one name
salmon_taxonomy <- wm_records_name(name = "Salmo salar")


```

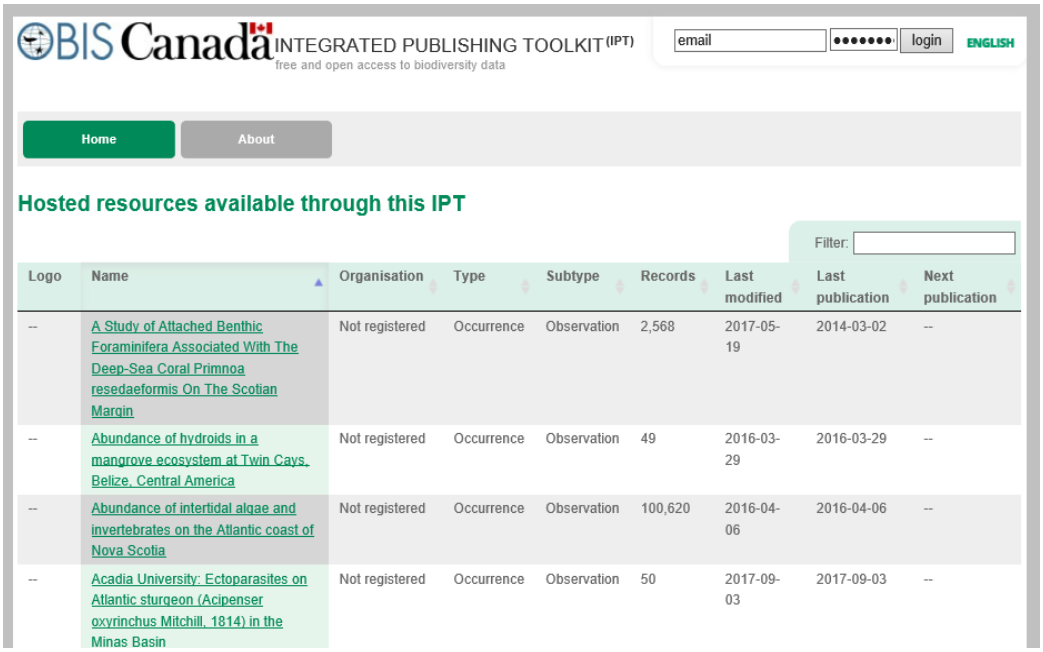
*The worrms package can only handle maximum 50 taxa at a time.

Navigating the Integrated Publishing Toolkit (IPT) website

This will be a high level introduction to IPT for the purpose of uploading datasets, please visit the **full length IPT Manual** for more information.

To navigate to the IPT website for the Canadian node, please visit: http://ipt.iobis.org/obiscanada/

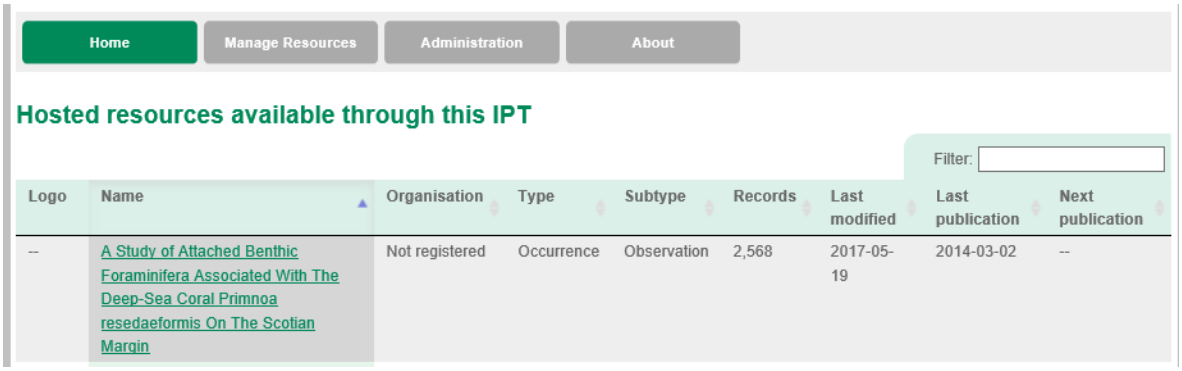
Sign in with your email and your password on the top right hand corner of the IPT home page.



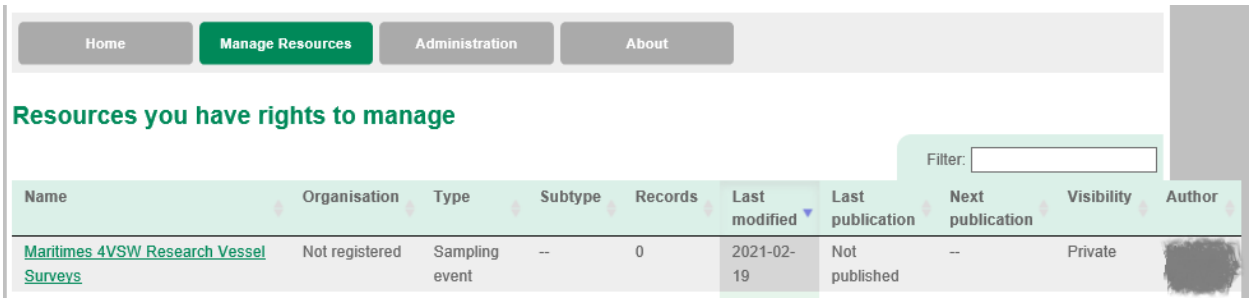
The navigation tab expands once an account login is established, as shown below:

Home: the home screen of the IPT website for the Canadian node displays datasets that are published and available to the public. Search for specific datasets by entering keywords in the "Filter" box.

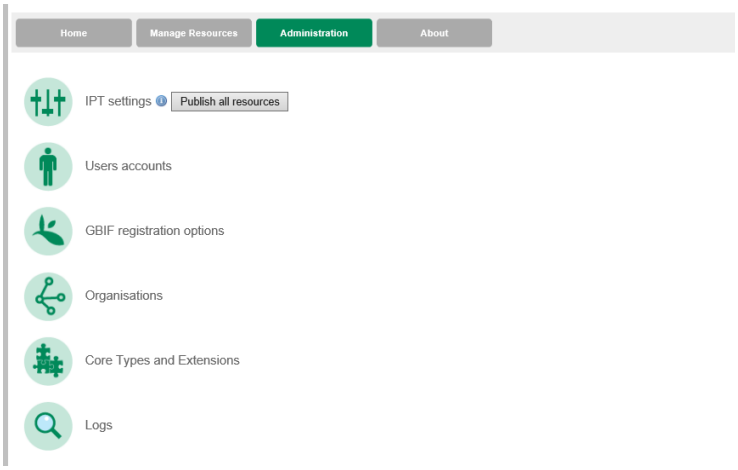
Each column (except Logo) in the dataset table can be sorted in either ascending or descending order by clicking on the button.



Manage Resources: the datasets that you have permission to manage will be displayed under this tab. Only datasets that you have created or that you have been assigned to will be visible to you on this tab if you have Manager privileges. Administrators will have access to a complete list of all datasets, including published resources (public and private) as well as private unpublished drafts.



Administration: only accessible by administrator accounts, the ability to create user accounts and other administrative tasks are hosted on this page.



Requesting an IPT account

Please contact the OBIS Canada Node manager Maria Cornthwaite (Maria.Cornthwaite@dfo-mpo.gc.ca) for an IPT account.

Creating and uploading a new dataset to Integrated Publishing Toolkit (IPT)

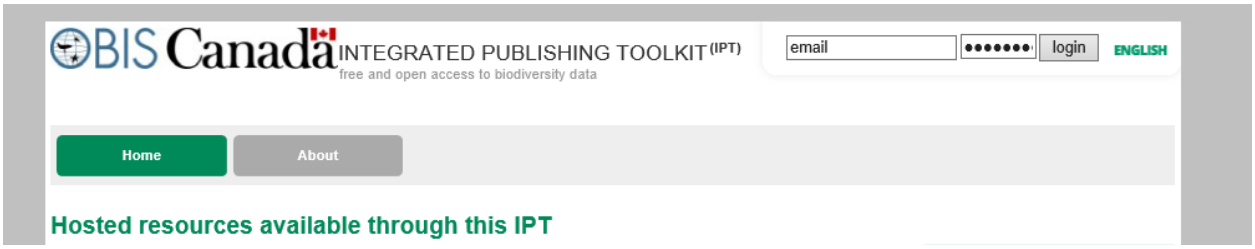
Creating new resources and uploading datasets to the Integrated Publishing Toolkit (IPT)

1. Sign onto IPT with your email & password
2. Select the Manage Resources tab
3. Scroll to the bottom of the page. In the section titled “Create New Resource” enter a “Shortname” for your dataset (a short descriptive working title free of whitespace which will become part of the URL on IPT), select the type as a “Sampling event” and select ”Create” (no file uploads are required at this stage).
4. Once your resource page has been created, your overview page will be displayed. This page can be accessed by selecting your dataset from the list displayed under the “Manage Resources tab.”
    i. **Source Data**: This section will allow you to manually upload your core and EMoF files to the IPT. Once uploaded, your file names are displayed here alongside an “Edit” button beside each file that will allow you to edit, delete or preview the mapping of a given source file. You can load all of your files at once if you zip them together. Large files (>104 mb) will also need to be zipped before uploading.
    ii. **Darwin Core Mappings**: this dropdown menu contains the different core mapping options that you will apply to your source files. Mapping your files is a required step.
    iii. **Metadata**: metadata will be entered via this section by clicking on the edit button. Once metadata has been input, its status will be displayed in this section. Click save before moving onto the next section.
    iv. **Published Versions**: the publish button is located here if the data hasn’t been published yet, otherwise the status of the version published will be listed in this section.

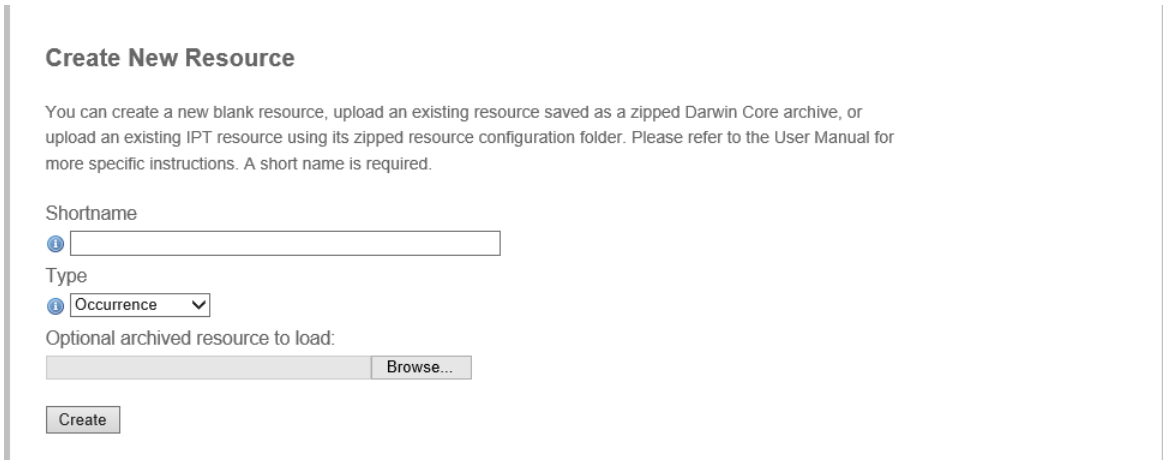
v. **Visibility**: datasets can be published publicly or privately. Data should be published privately initially and released to the public only after Q/C is completed. Dataset authors should be notified when data will be published on OBIS Canada.

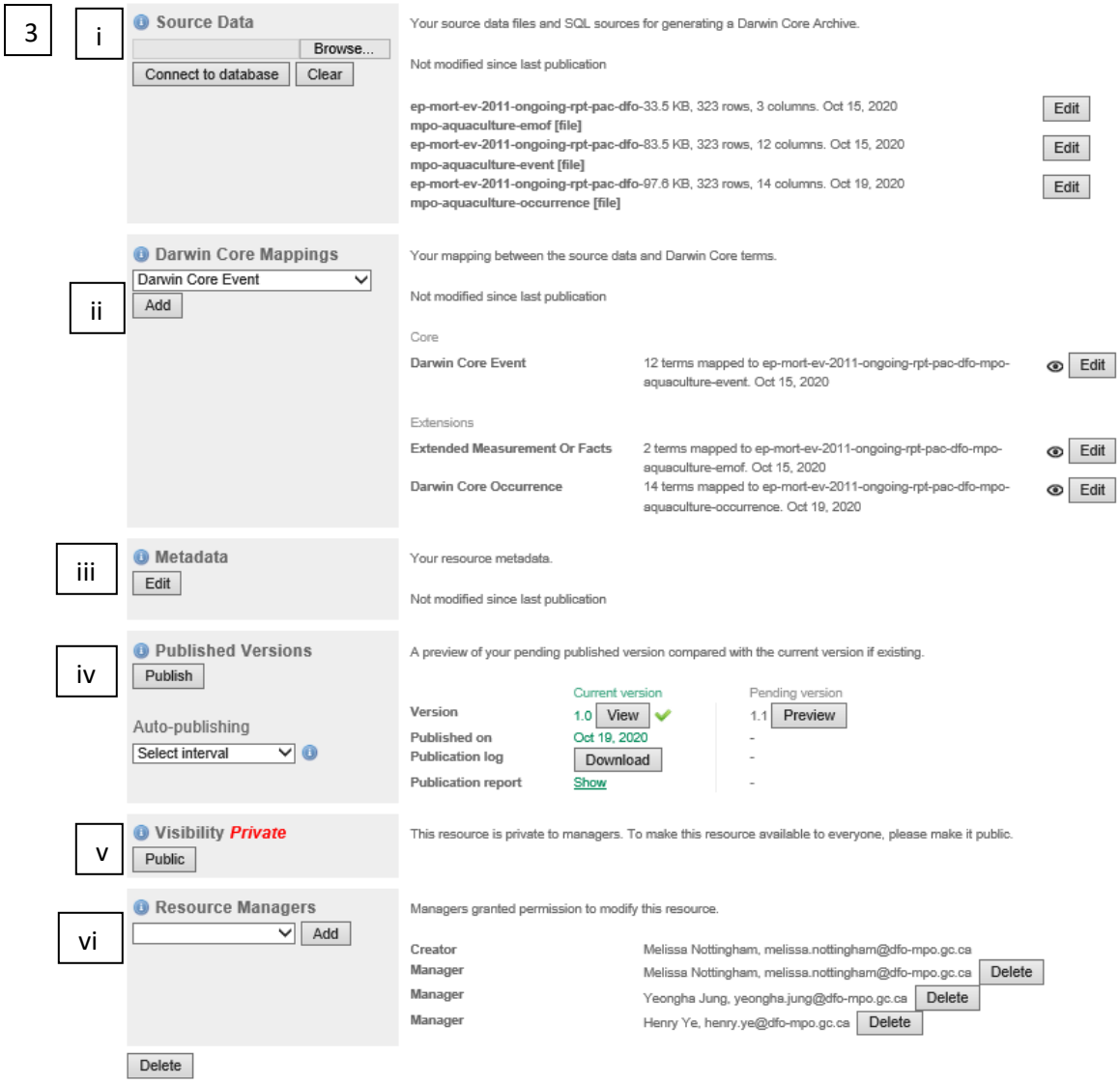
vi. **Resource Managers**: Information regarding the resource managers and creators is displayed here. Managers can be added or removed in this section.

1



2




3
i
Source Data
Browse...
Connect to database
Clear
Your source data files and SQL sources for generating a Darwin Core Archive.
Not modified since last publication
ep-mort-ev-2011-ongoing-rpt-pac-dfo-mpo-aquaculture-emof [file] 33.5 KB, 323 rows, 3 columns. Oct 15, 2020
Edit
ep-mort-ev-2011-ongoing-rpt-pac-dfo-mpo-aquaculture-event [file] 83.5 KB, 323 rows, 12 columns. Oct 15, 2020
Edit
ep-mort-ev-2011-ongoing-rpt-pac-dfo-mpo-aquaculture-occurrence [file] 97.6 KB, 323 rows, 14 columns. Oct 19, 2020
Edit
ii
Darwin Core Mappings
Darwin Core Event
Add
Your mapping between the source data and Darwin Core terms.
Not modified since last publication
Core
Darwin Core Event
12 terms mapped to ep-mort-ev-2011-ongoing-rpt-pac-dfo-mpo-aquaculture-event. Oct 15, 2020
Edit
Extensions
Extended Measurement Or Facts
2 terms mapped to ep-mort-ev-2011-ongoing-rpt-pac-dfo-mpo-aquaculture-emof. Oct 15, 2020
Edit
Darwin Core Occurrence
14 terms mapped to ep-mort-ev-2011-ongoing-rpt-pac-dfo-mpo-aquaculture-occurrence. Oct 19, 2020
Edit
iii
Metadata
Edit
Your resource metadata.
Not modified since last publication
iv
Published Versions
Publish
Auto-publishing
Select interval
A preview of your pending published version compared with the current version if existing.
Current version
Pending version
Version
1.0 View
1.1 Preview
Published on
Oct 19, 2020
-
Publication log
Download
-
Publication report
Show
-
v
Visibility Private
Public
This resource is private to managers. To make this resource available to everyone, please make it public.
vi
Resource Managers
Add
Managers granted permission to modify this resource.
Creator
Melissa Nottingham, melissa.nottingham@dfo-mpo.gc.ca
Manager
Melissa Nottingham, melissa.nottingham@dfo-mpo.gc.ca
Delete
Manager
Yeongha Jung, yeongha.jung@dfo-mpo.gc.ca
Delete
Manager
Henry Ye, henry.ye@dfo-mpo.gc.ca
Delete
Delete

Uploading your data to IPT

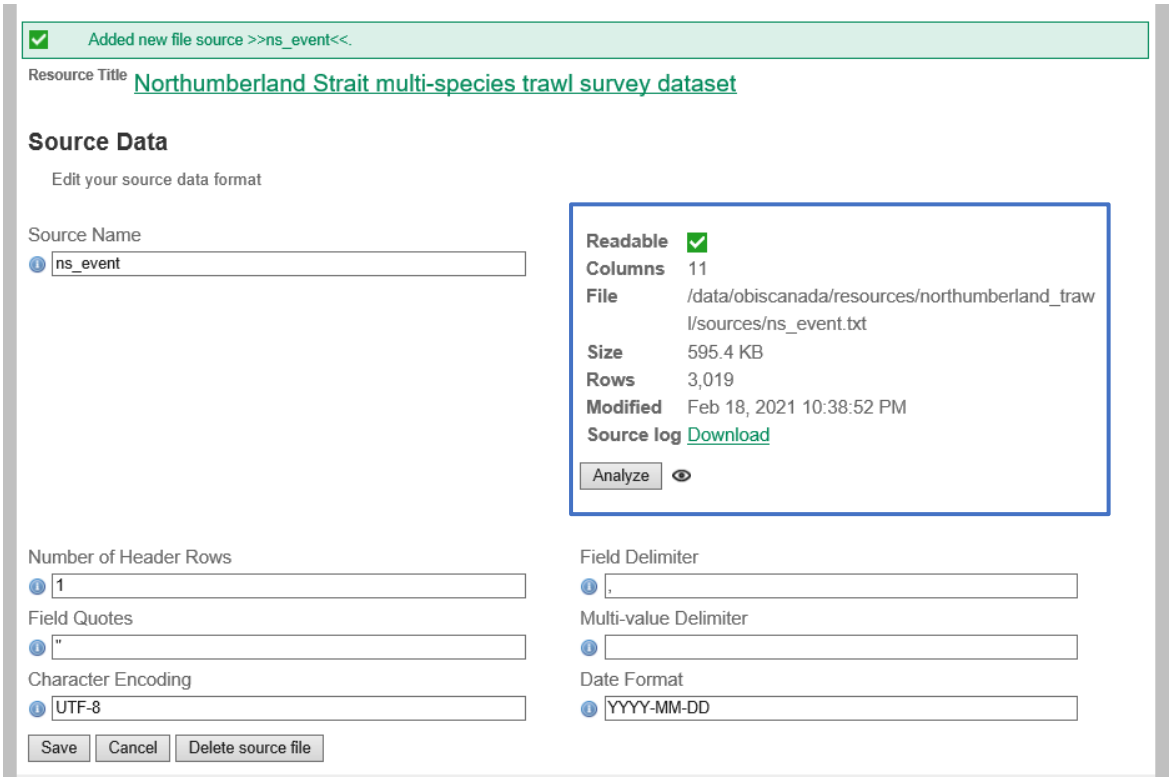
NOTE: SAVE YOUR WORK OFTEN AS IPT WILL LOG YOU OUT AFTER A RELATIVELY SHORT TIME

Once you've created a new resource page for your dataset, you can begin to upload your files.

Source Data: upload files onto IPT via the 'Choose File' button highlighted in the **red box** below on the dataset Overview page. Files can be uploaded individually or in a .zip compressed format (IPT will automatically unzip them). Files which have been uploaded will show up in the area highlighted by the **blue box**.

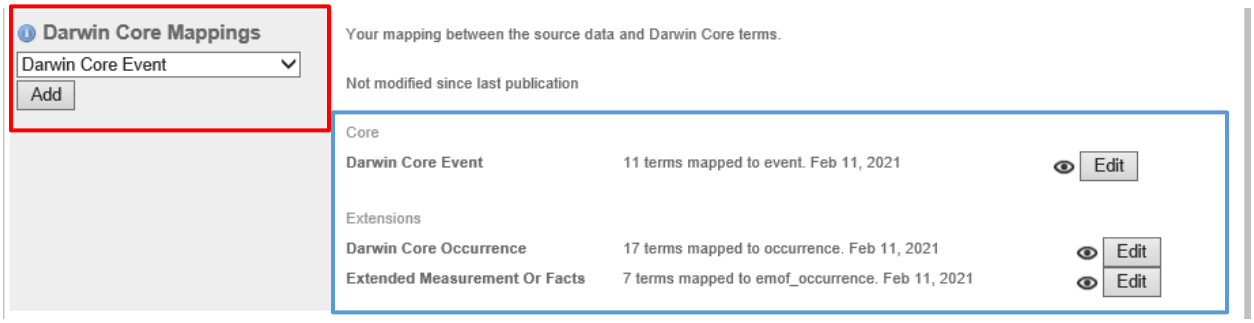
Source Data Page: this page opens upon successful file upload. Confirm or edit the information pertaining to the data file and click 'Save' to verify the file. The information in the **blue box** below outlines some metadata for the data file, including the number of columns and whether it is readable or not.

*this page can be reached by clicking the 'Edit' button beside each dataset from the previous step

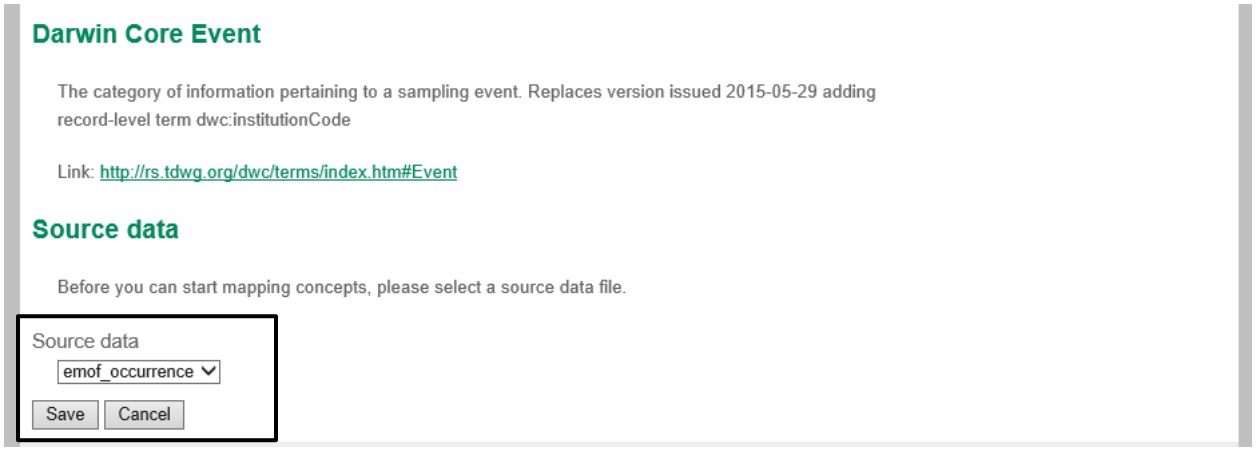


Darwin Core Mappings: once all of the data files have been uploaded to IPT, the source files can be linked to the appropriate Darwin Core terms by selecting a mapping option from the dropdown menu highlighted by the **red box** and pressing the 'Add' button. Map your Event Core as a "Darwin Core Event," your Occurrence Core as a "Darwin Core Occurrence" and your EMoF files as "Extended Measurement Or Facts."

Files which have been mapped will show up in the area highlighted by the **blue box**.

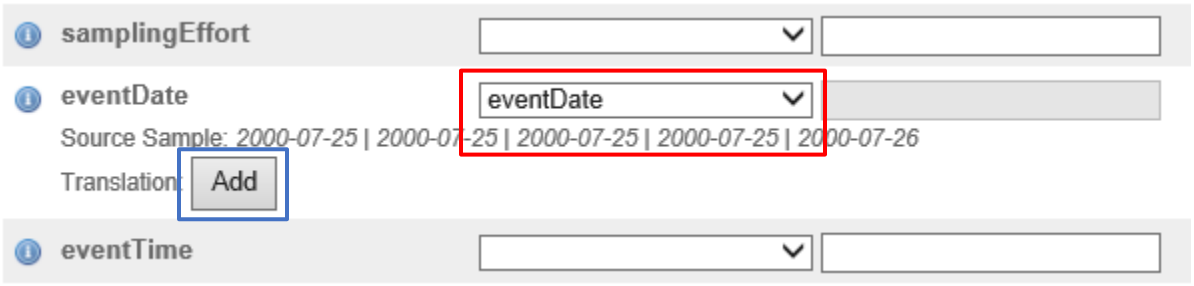


The following page will pop up after clicking the 'Add' button from the screenshot above, highlighted by the **red box.** Select the dropdown highlighted in the **black box** below to select the appropriate file to map and click 'Save'.

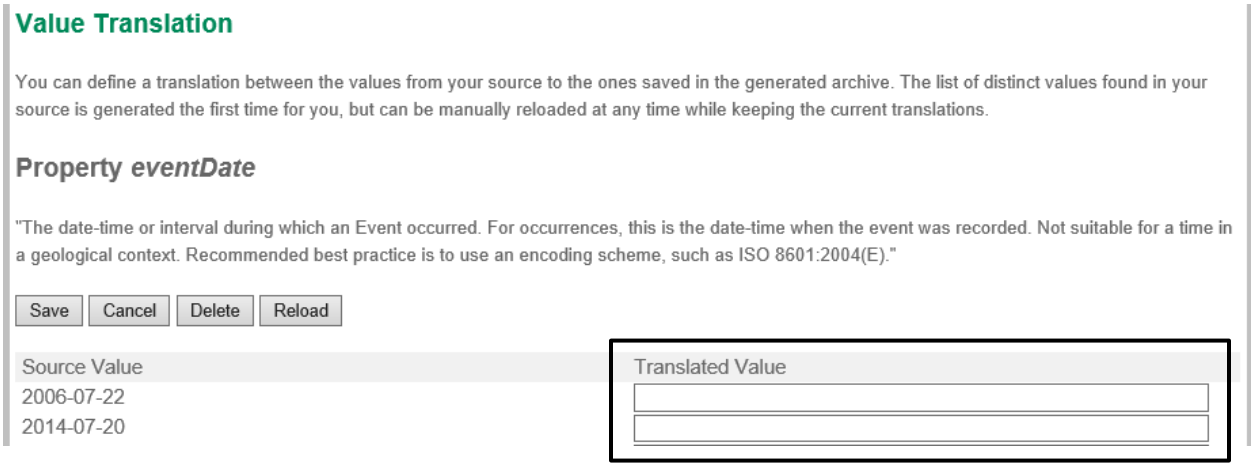


After each file is mapped, IPT will open the following page, this is where column headers and data cells are automatically mapped and catalogued within IPT. Column headers can be remapped with the dropdown highlighted in the **red box**. This is a required step if the data file's headers are not the same as the DwC terms — headers that do not match DwC standards will not be automatically mapped by IPT.

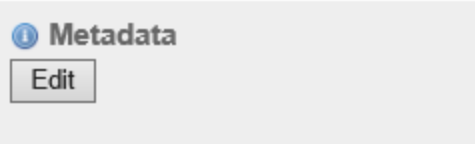
*this page can be reached by clicking the 'Edit' button beside each mapped core files above.



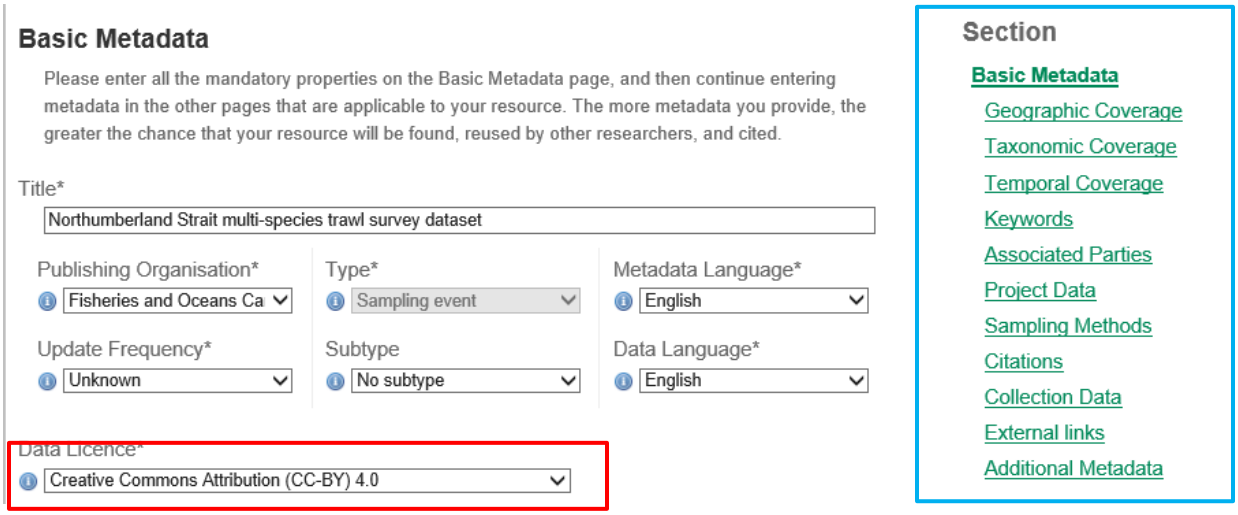
Value Translation: the following page below will open if the 'Add' button (highlighted by the **blue box** above) is clicked. From here, the source value can be translated by unique values or in bulk if all values are the same for the entire table, the translated value can be entered into the form box below, highlighted in the **black** box below.



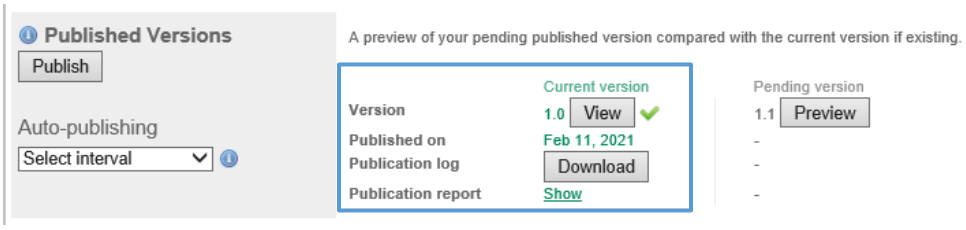
Metadata: Metadata can be accessed by clicking on the 'Edit' button below the metadata section.



This will take you to the metadata pages where the dataset's metadata can be entered in the forms displayed on each page. The basic metadata section can now be completed. Note that most datasets should be assigned the same Data License as the example listed below, highlighted by the **red box**. All other sections of metadata can be completed by clicking the links on the right side of the page highlighted within the **blue box**.

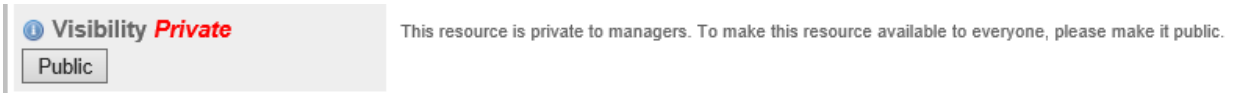


Published Versions: once the dataset is completely uploaded and mapped, the metadata is completed, and the dataset have been approved for release to the public; click on the 'Publish' button to publish the dataset.



A preview/view of the published dataset page, along with the version and publication date can be found within the **blue box** above.

Visibility: the visibility button is displayed below. If the visibility is set to 'Private', only the data manager and administrators can view the dataset on IPT. Select "Public" once you've completed your post-publication Q/C review, then take a moment to celebrate your contribution to global biodiversity mapping.

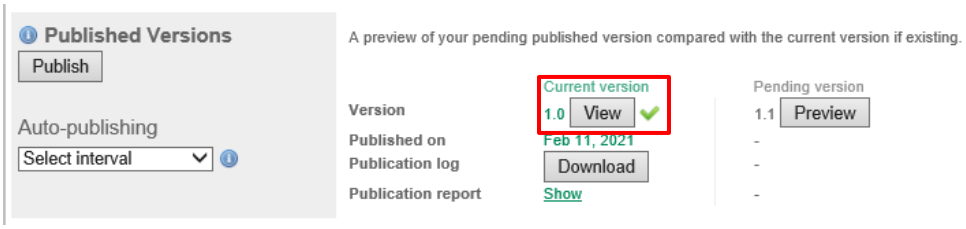


Resource Managers: by clicking on the drop down, one or multiple resource managers can be added to a dataset. The list of managers as well as its creator are indicated within the **red box** below.

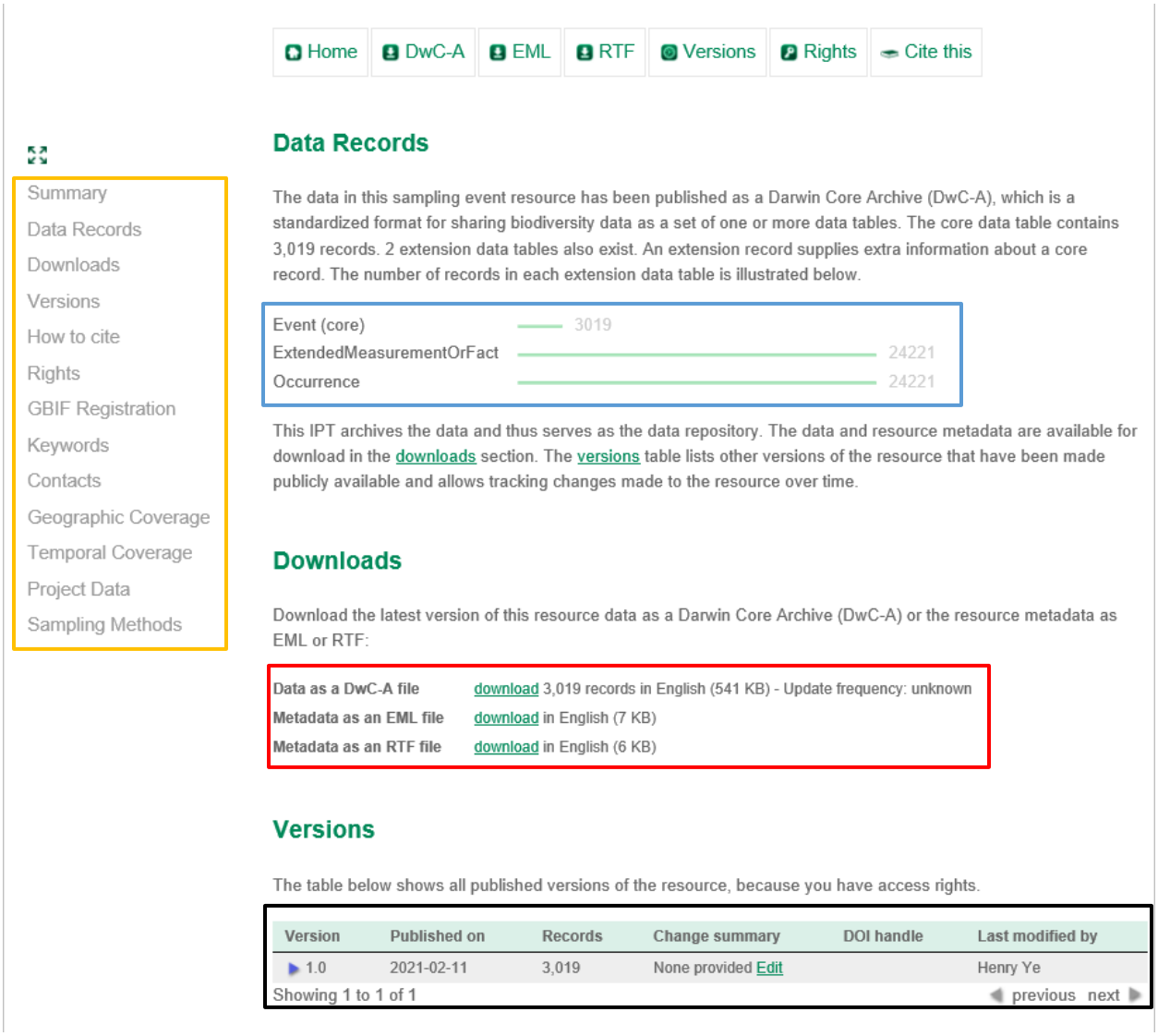
*A dataset manager must have to have an existing IPT account at the manager level in order to be added as a resource manager.

Review your entry

Click on the 'View' button from step 6 in the previous section to see the dataset from the public's view.



A sample of a dataset's public view is illustrated below:



The number of records in each file (Event, Occurrence, EMoF) can be seen in the **blue box**

The different file formats and download links can be seen in the **red box**

The information for each version can be seen in the **black box**

The navigation bar on the left hand side (in the **yellow box**) will jump to the various sections on the page, most of this will be the content from the

Removing datasets on IPT

Removing datasets on IPT that have already been published and/or registered with GBIF:

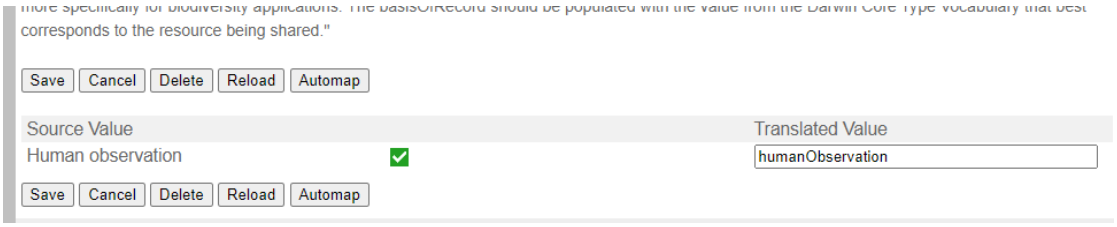
- If only published to OBIS: email Pieter Provoost at p.provoost@unesco.org or helpdesk@obis.org and let them know you would like to remove the old dataset. They will let you know if the data has been cited or referenced elsewhere and whether you should archive to metadata-only or delete the page entirely.
- If archiving, delete the data files and mapping on IPT and change type to "metadata-only", link to the new IPT pages and re-publish.
- If the data is also registered to GBIF, email helpdesk@gbif.org to let them know you intend to delete/archive the data.
- Once you have had responses from OBIS and GBIF help desks, you can go ahead and delete or archive your data and let them know it has been done so the old data can be removed from the OBIS and/or GBIF databases.

IPT Tips and Tricks

Basis Of Record

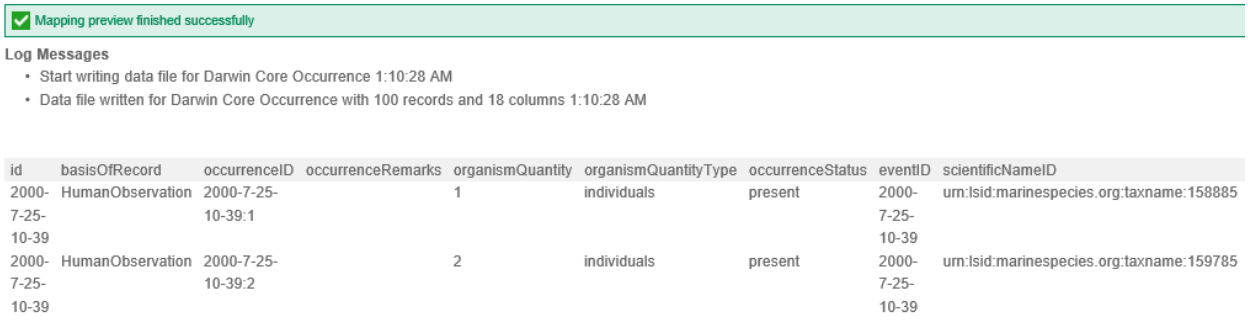
When reviewing datasets some errors can be fixed without reloading data. For example HumanObservation is the required term for basisOfRecord, with no spaces in between. Changes can be made in the 'edit' section of the data file section:

If the example above showed Human observation, it is possible to click 'add' then enter the correct value in 'translated value' and then click 'auto-map' to correct the error in all the data.



The icon

this icon will give you a preview of the document that is situated beside the icon. For instance, in the Darwin Core Mappings section on the dataset's home page, clicking on the icon will pop up a preview window of the data table. Any actions by mouse or keyboard will close the preview screen.



id	basisOfRecord	occurrenceID	occurrenceRemarks	organismQuantity	organismQuantityType	occurrenceStatus	eventID	scientificNameID
2000-7-25-10-39	HumanObservation	2000-7-25-10-39:1		1	individuals	present	2000-7-25-10-39	urn:lsid:marinespecies.org:taxname:158885
2000-7-25-10-39	HumanObservation	2000-7-25-10-39:2		2	individuals	present	2000-7-25-10-39	urn:lsid:marinespecies.org:taxname:159785

OBIS Canada Logo:

To add an OBIS Canada logo, navigate to the 'Additional Metadata' under the Metadata section of the dataset. Enter in the following link under the 'Resource logo URL' section in the forms box and click upload.

http://ipt.iobis.org/obiscanada/images/GBIF-2015-standard-ipt.png

Alternatively if an icon image is available on the local machine, pressing 'Browse…' will pop up a window to select the logo file for the dataset to be uploaded.

Inorganic materials and unknown species

Inorganic materials such as rocks, garbage, unknown objects (non-living) should be excluded from datasets to published onto OBIS – they are not useful for most biological studies. Similarly, entries listed as "unknown species" or "unidentified" that cannot be assigned to a taxonomic kingdom should be omitted as well

Publishing Errors:

Updating or replacing occurrence or EMoF data files without altering the event core file can lead to publishing errors. In the event the error occurs, please follow the steps below to circumvent the error.

1. Delete all of the source files from IPT.
2. Remove the ghost columns from the EMoF (if applicable, ghost columns are empty columns with no headers and no data).
3. Re-zip and re-upload the event core, occurrence core, and EMoF files.
4. Remap the source files to each of the cores and EMoFs on IPT.
5. Publish!

END OF GUIDE