Submitting Protocols

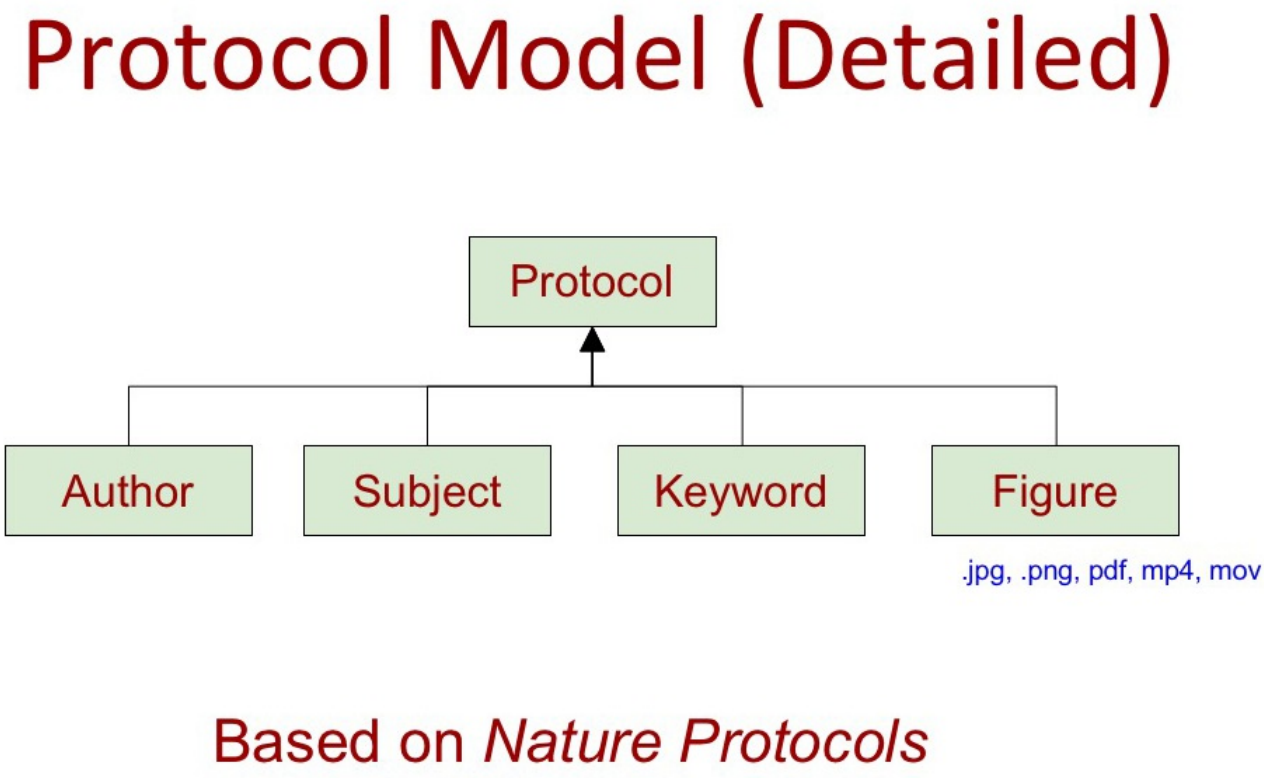
This page provides instructions for adding protocols to the GUDMAP/RBK Data Explorer, based on the *Nature Protocols* format.

If you have any questions or feedback, please send them to your consortium's help email: help@gudmap.org or help@rebuildingakidney.org

We also have the following training materials available:

- Webinar Slides
- Webinar Replay 12/6/17 (41:12)
- Tutorial Videos (Coming Soon)

Schema



Overview (READ FIRST)

Adding protocols involves the following steps:

1. Make sure you are in the correct Globus authentication group, kidney-writers, and that you are logged in.
2. Create a base Protocol record (required).
3. Add at least one Subject Term (Required)
4. Add at least one Keyword (Required)
5. Add at least one contact Protocol Authors (Required)
6. Add Figures, Videos (optional)

NOTE: To update an existing protocol, go to the original protocol, click Edit in the header, make your changes and then make sure to update the *Version* field to the next number.

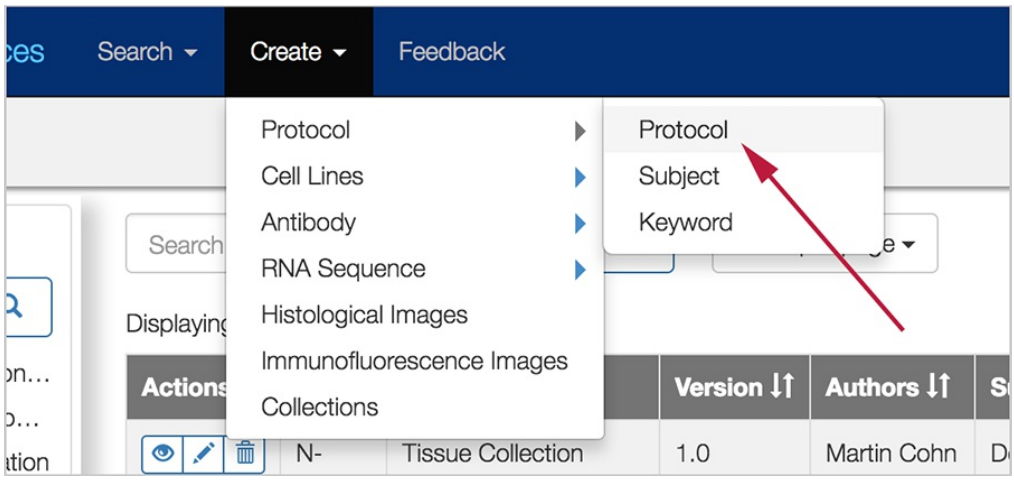
Are you in the `kidney-writers` group? (Required)

If you haven't already done so, go to this link to join the group: https://www.globus.org/app/groups/af0b4010-5b75-11e6-9575-22000aef184d/about

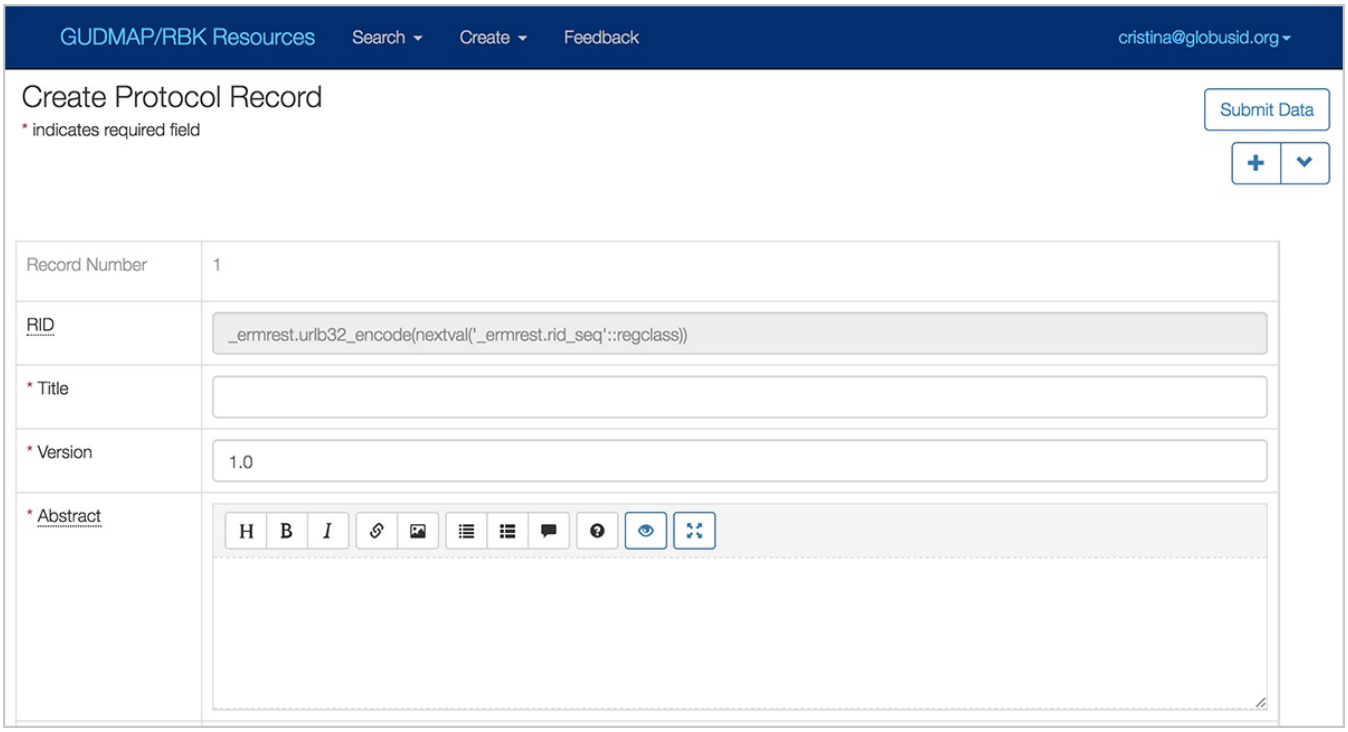
You can find more details about this process at Accessing GUDMAP and RBK Resources.

1. Create the base Protocol Record

- Make sure you are logged in.
- In the top navigation bar, click *Create* > *Protocol* > *Protocols*.



- The *Create Protocols Record* form appears (see excerpt below):



  See screenhot of full length form here.

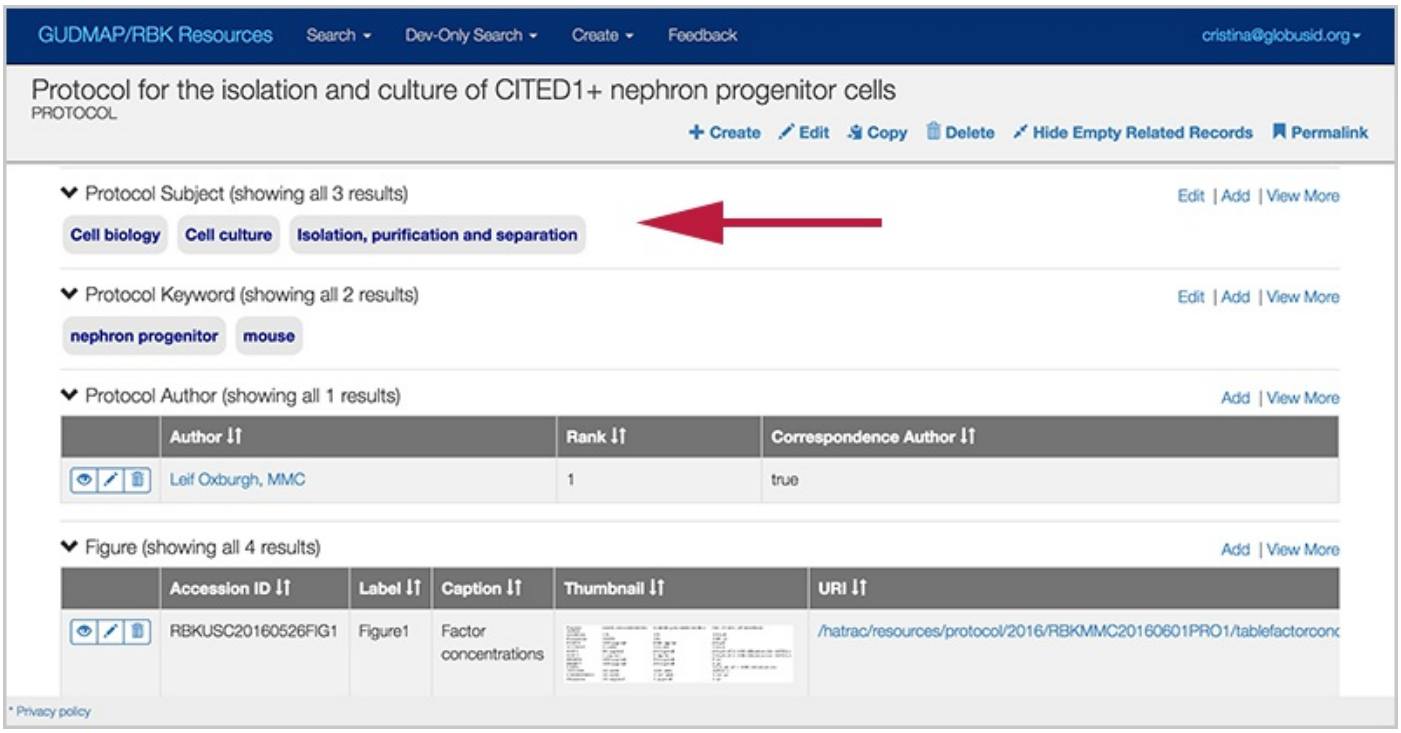
- Fill in the fields. Note that the following fields are **required**: (You can format text using Markdown. Find more information about formatting your larger text fields here.)
  - *Title*: Please provide a concise but informative title that describes the protocol to unfamiliar users.
  - *Abstract*: Add a short paragraph describing the protocol further
  - *Procedure*: Enter the actual steps to perform the protocol.
  - *Data Provider*: This is your lab's institution. If you need to add an institution, please contact the Hub.
  - *Curation Status*: Choose either
    - *In Preparation* (still drafting),
    - *PI Review* (ready for internal approval), or
    - *Submitted* (ready for Hub review). Your data will **not** be viewable publicly until approved for *Release* by the Hub. For a complete description of the Curation Process, click here.

- When finished, scroll back to the top of the page and click *Submit Data*.

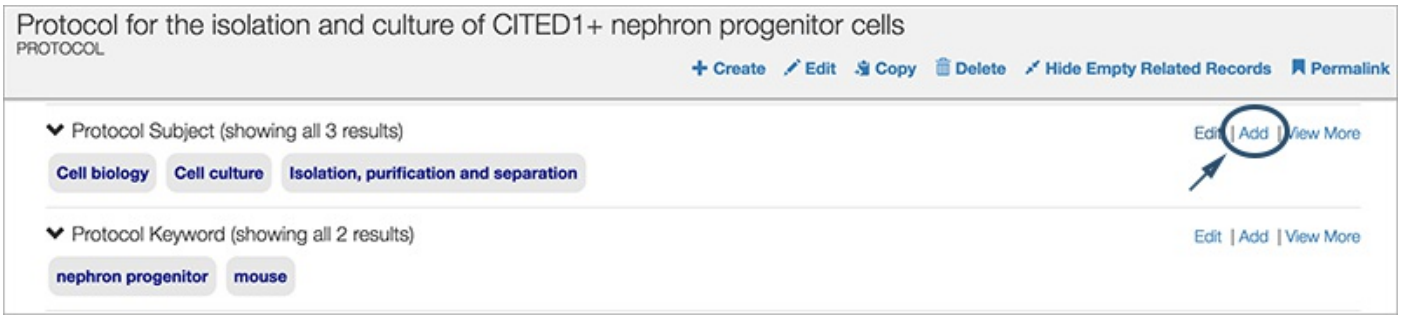
2. Add Subject Terms

Although only one Subject Term is required for a protocol, we **highly recommend adding two or three** to make your protocol easier to search.

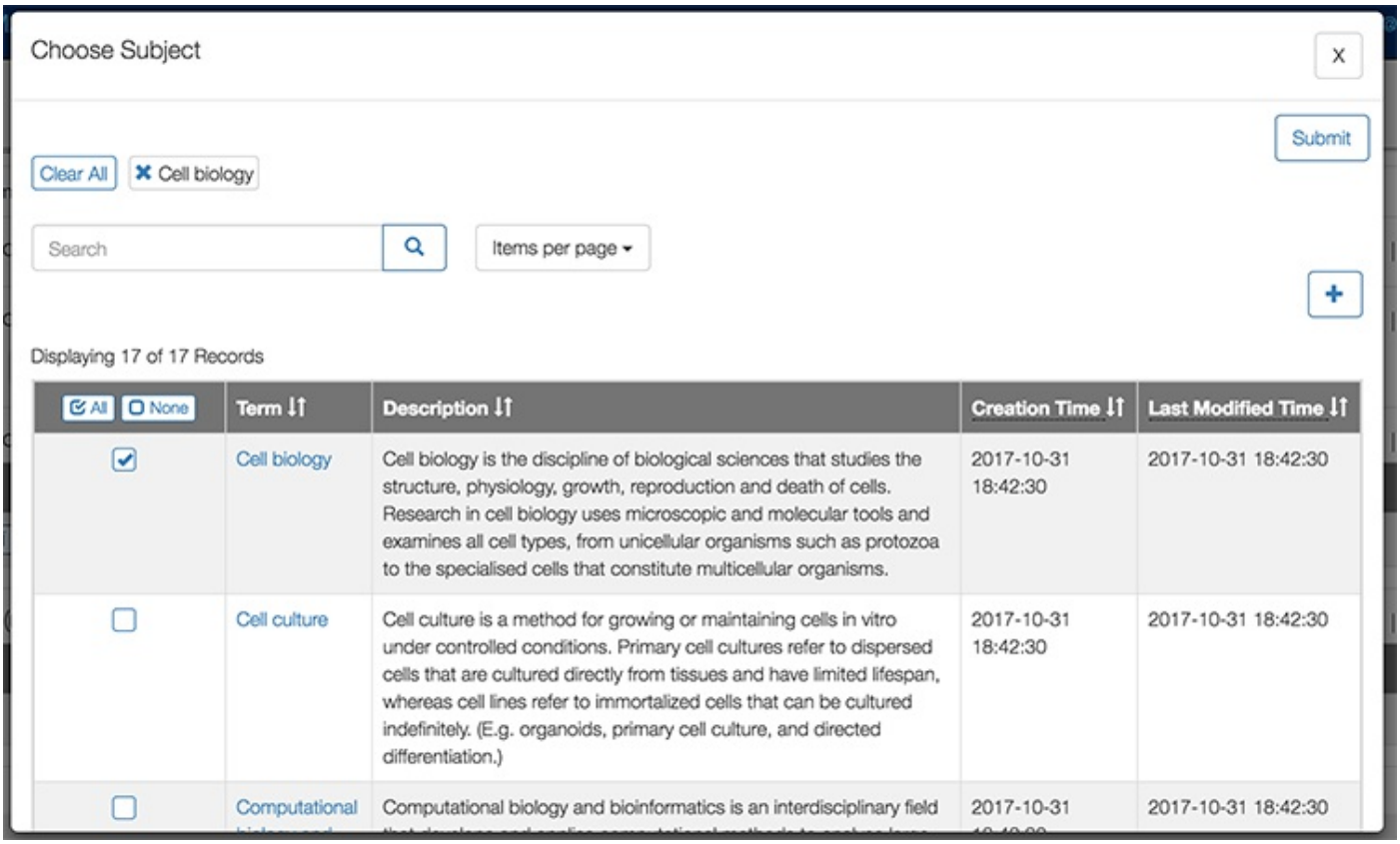
- From the base protocol record you just created, scroll down until you see the section "Protocol Subject"



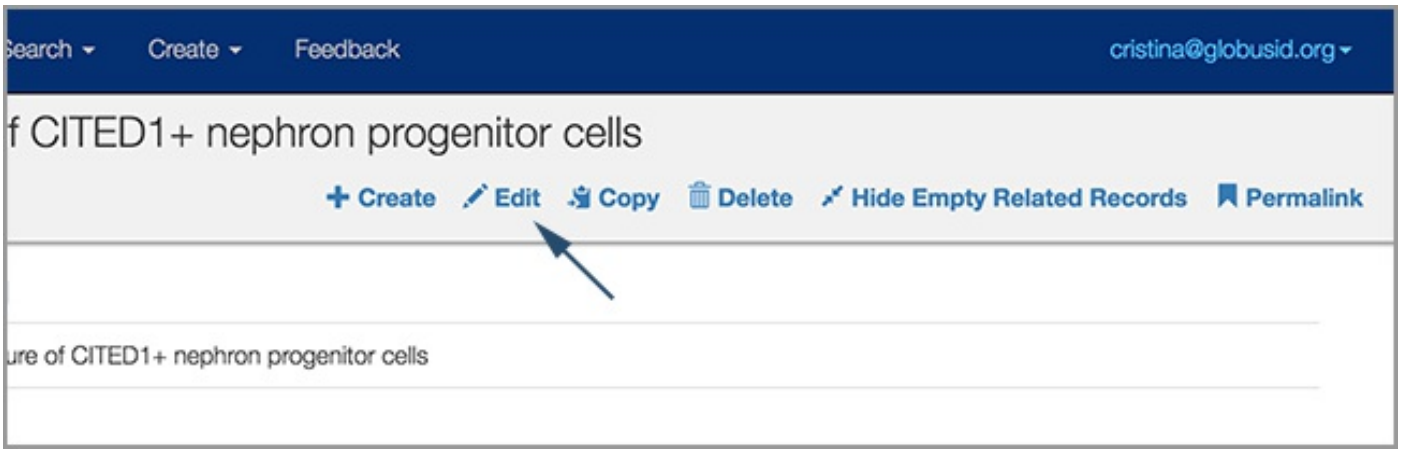
- Click the "Add" link in the upper right corner of the "Protocol Subject" section.



- In the modal window, scroll through the list or start typing a term in the search box to narrow the results.



- Click the checkboxes of your desired subject terms.
- When finished, click *Submit* in the upper right corner to save your data.
- Repeat for each subject term you wish to add.
- You can always navigate back to the record and click *Edit* and make changes to your record.

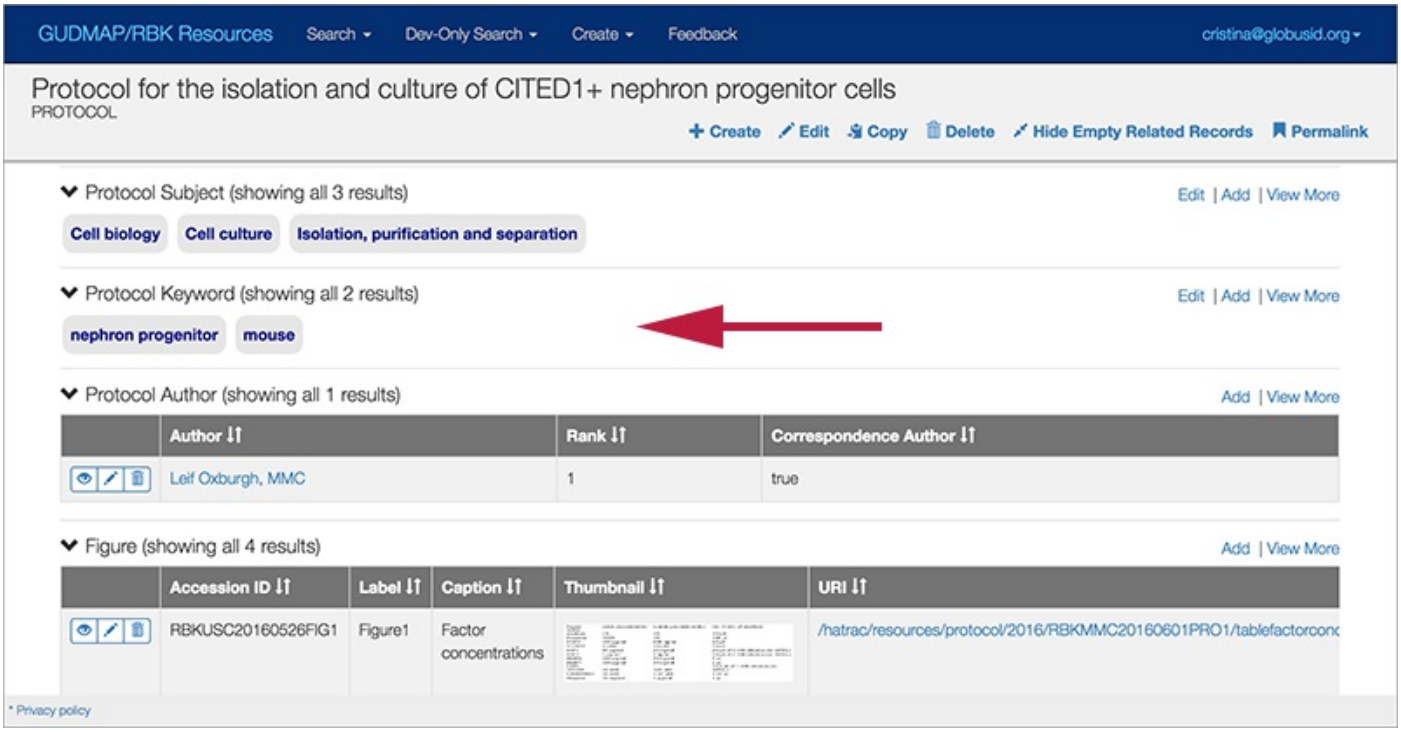


3. Add Keywords

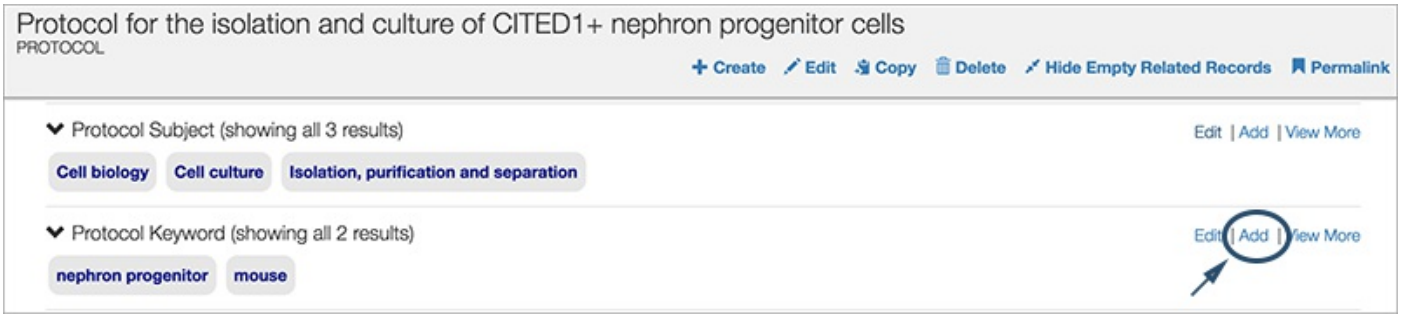
The process for adding Keywords is basically the same as for Subject Terms.

Although only one Keyword is required for a protocol, we **highly recommend adding two or three** to make your protocol easier to search.

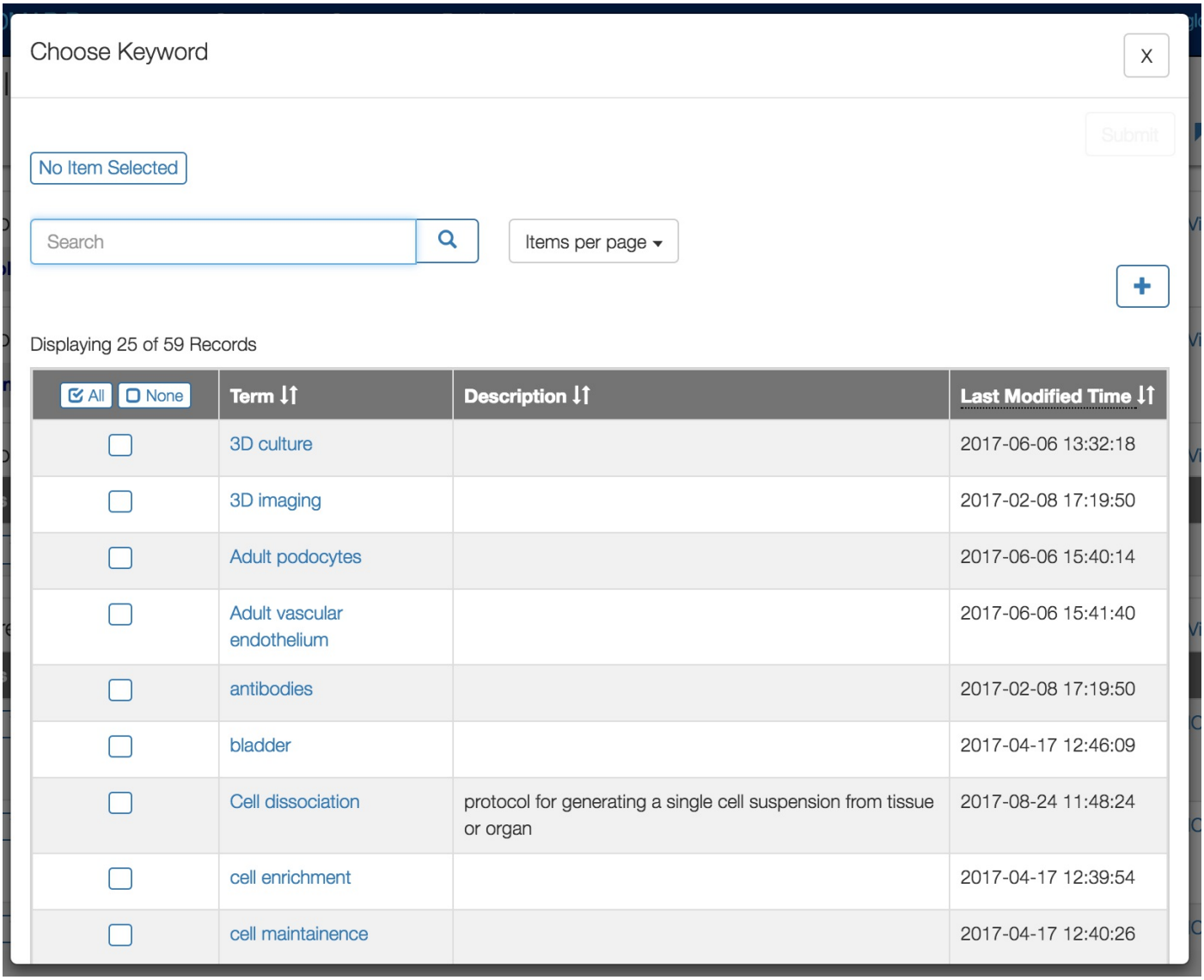
- If you need **to add a keyword, send email to Todd Valerius** at todd@valeriuslab.org. Please make sure you've searched the existing list before requesting a new term.
- From the base protocol record, scroll down until you see the section "Protocol Keyword"



- Click the "Add" link in the upper right corner of the "Protocol Keyword" section.

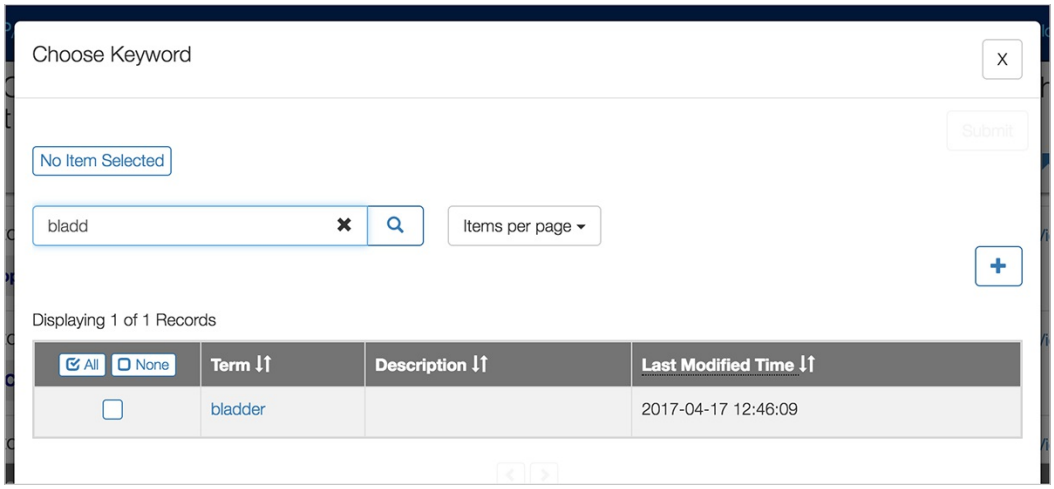


- In the modal window, scroll through the list...

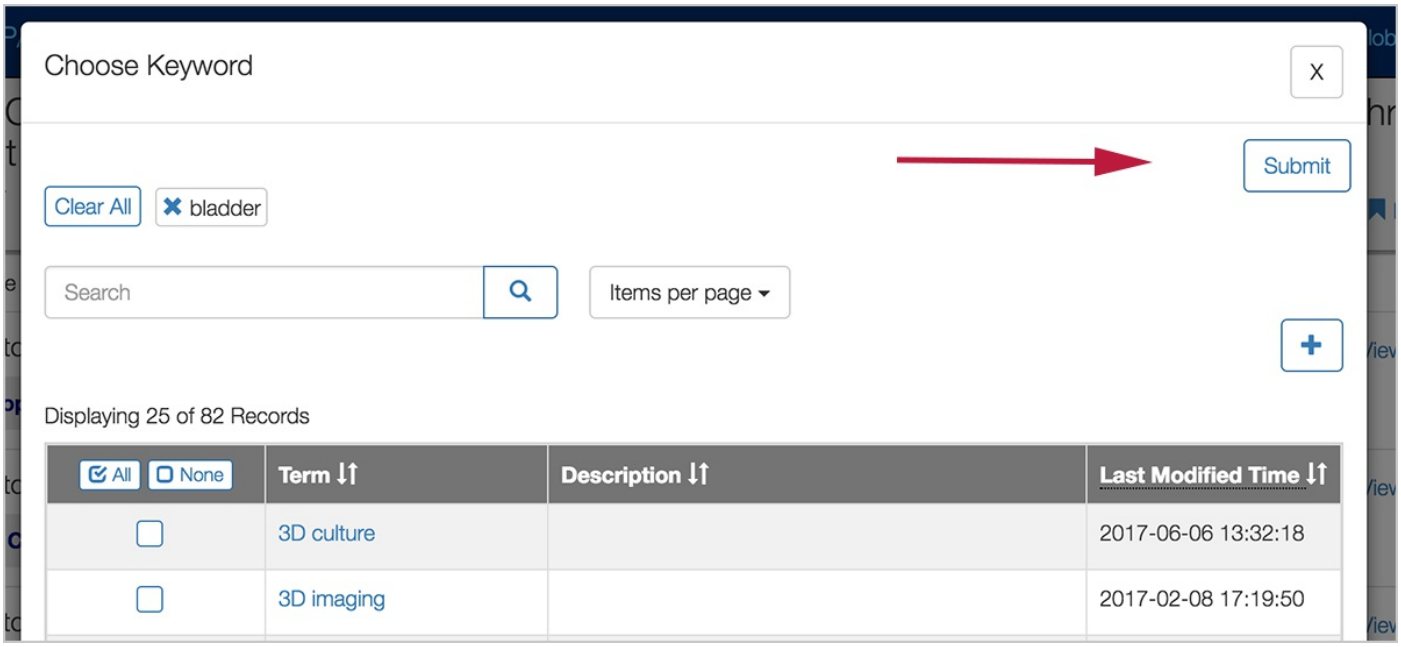


OR

...start typing a term in the search box to narrow the results.



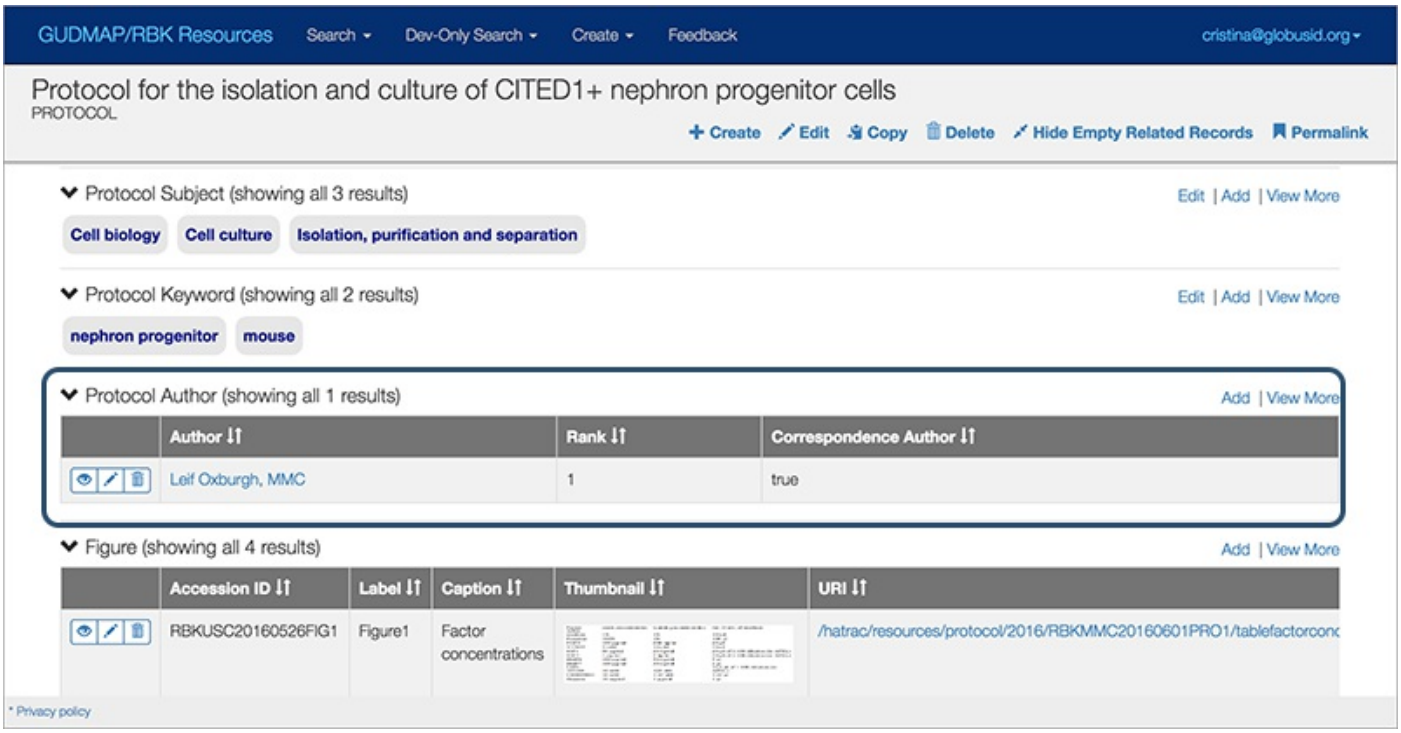
- Click the checkboxes of your desired keywords.
- When finished, click *Submit* in the upper right corner to save your data.



- Note that until you change the *Curation Status* field to *Submitted*, you can keep going back to a record to edit and submit (save) as much as you like.

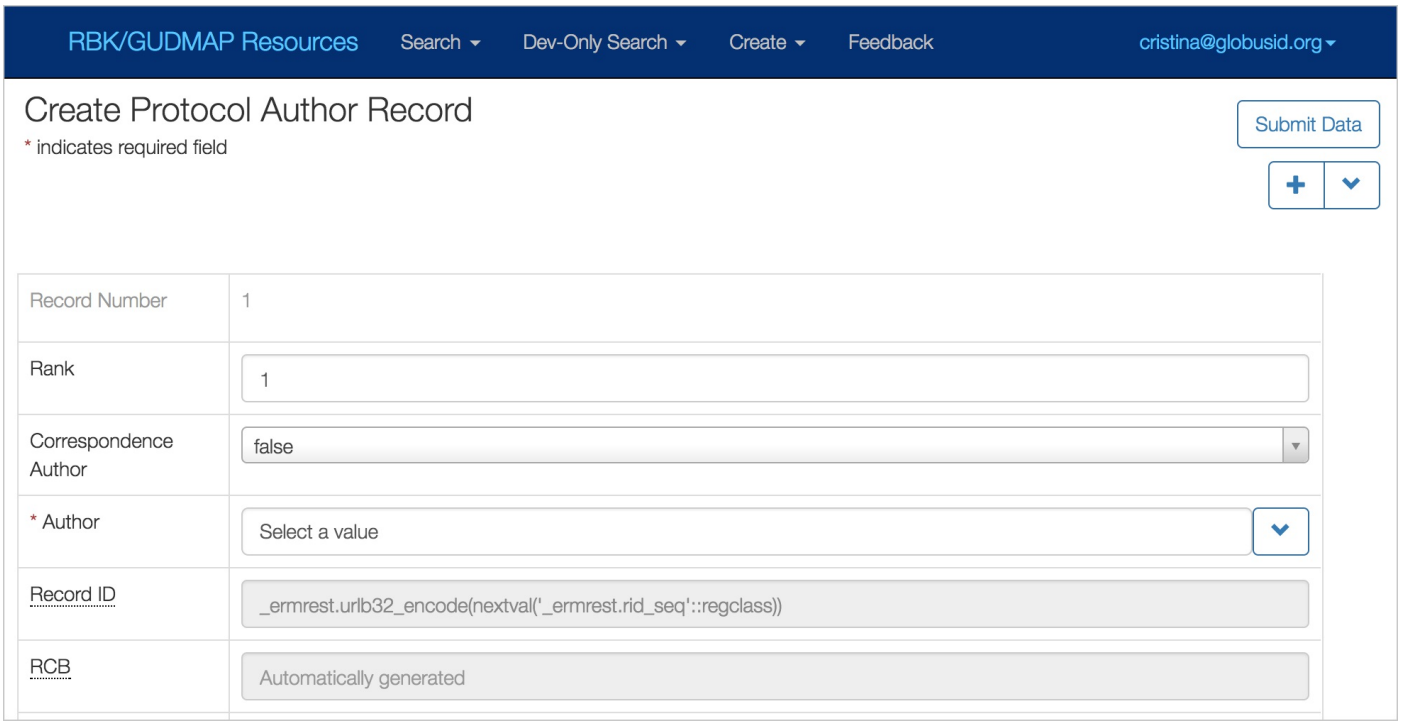
4. Add Protocol Authors

- From your new protocol record, scroll down until you see the section "Protocol Authors".

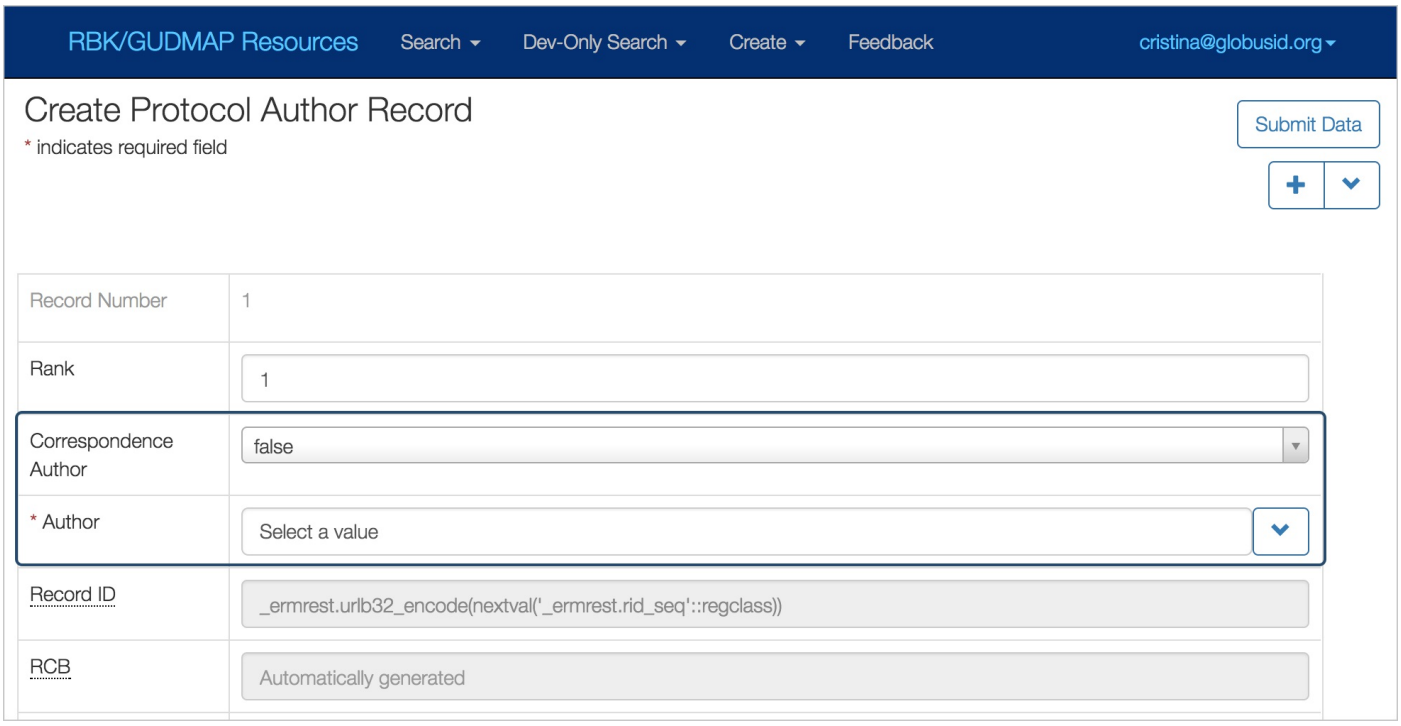


- Click the "Add" link in the upper right corner of the "Protocol Authors" section.

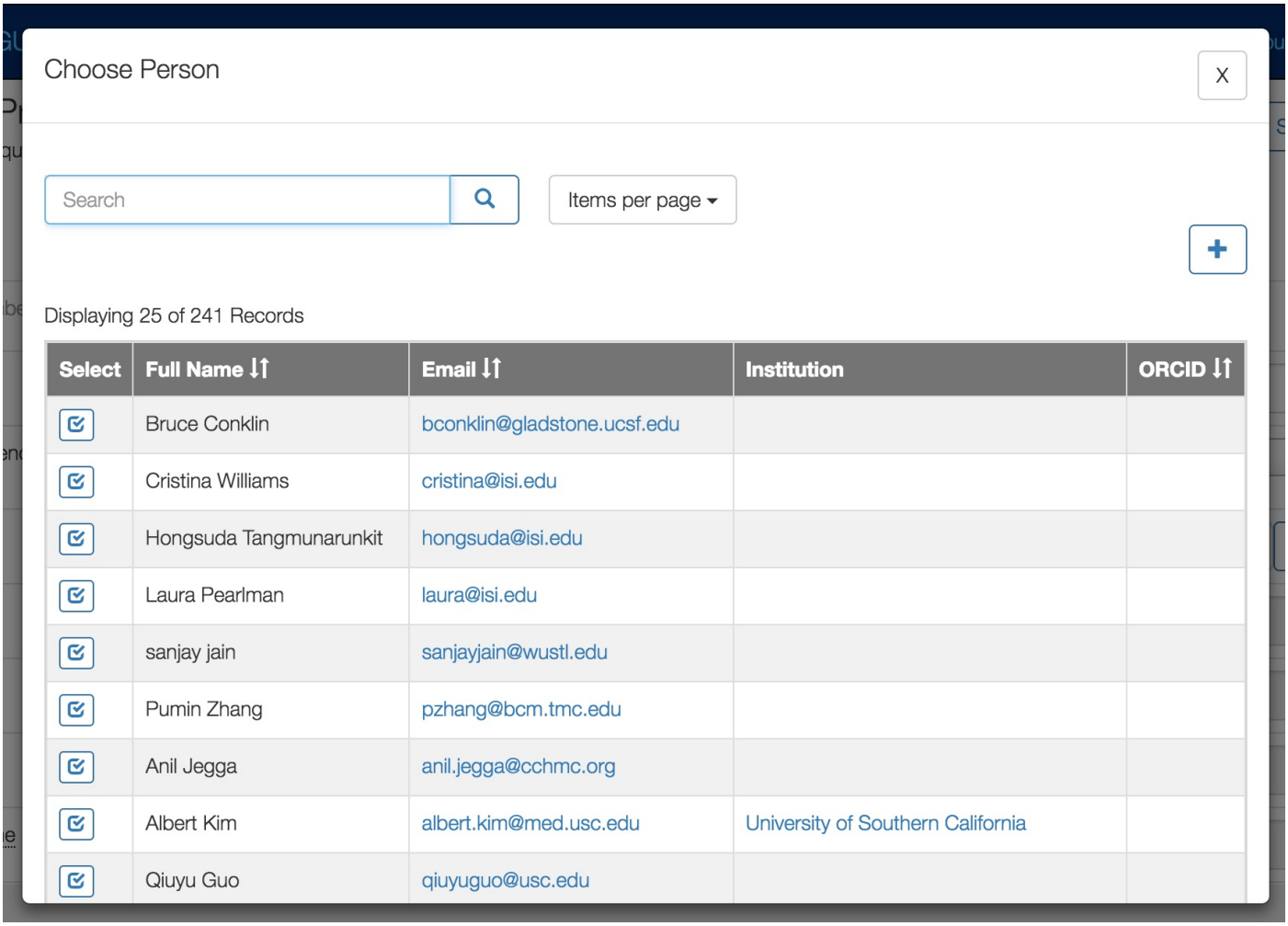
The 'Create Protocol Author Record' tab appears.



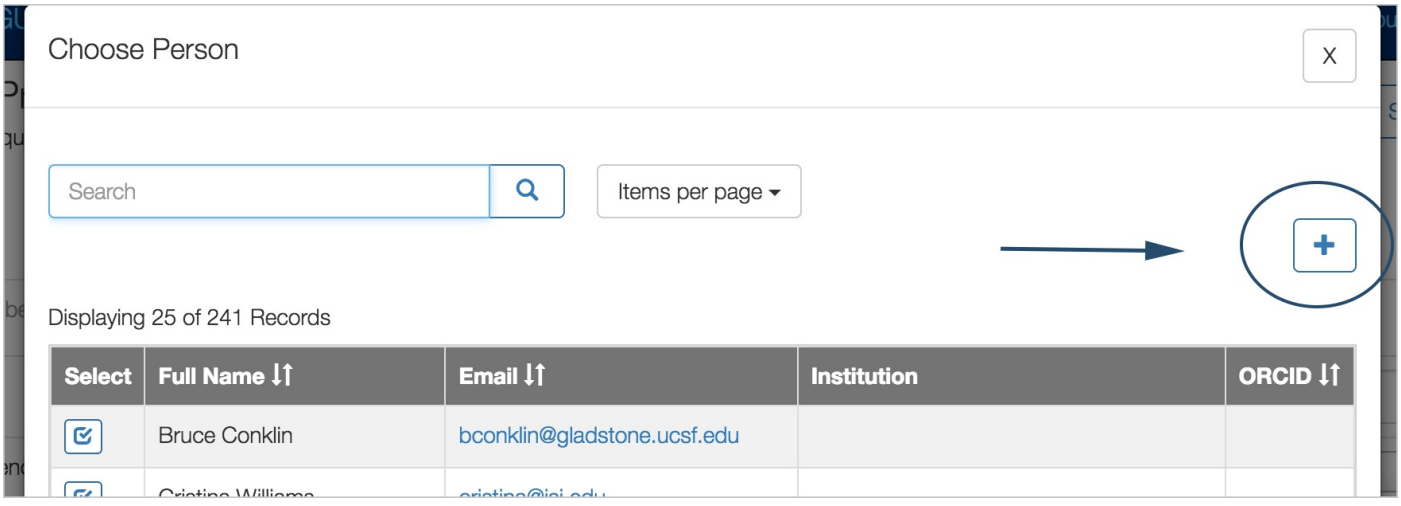
- Fill out the fields.



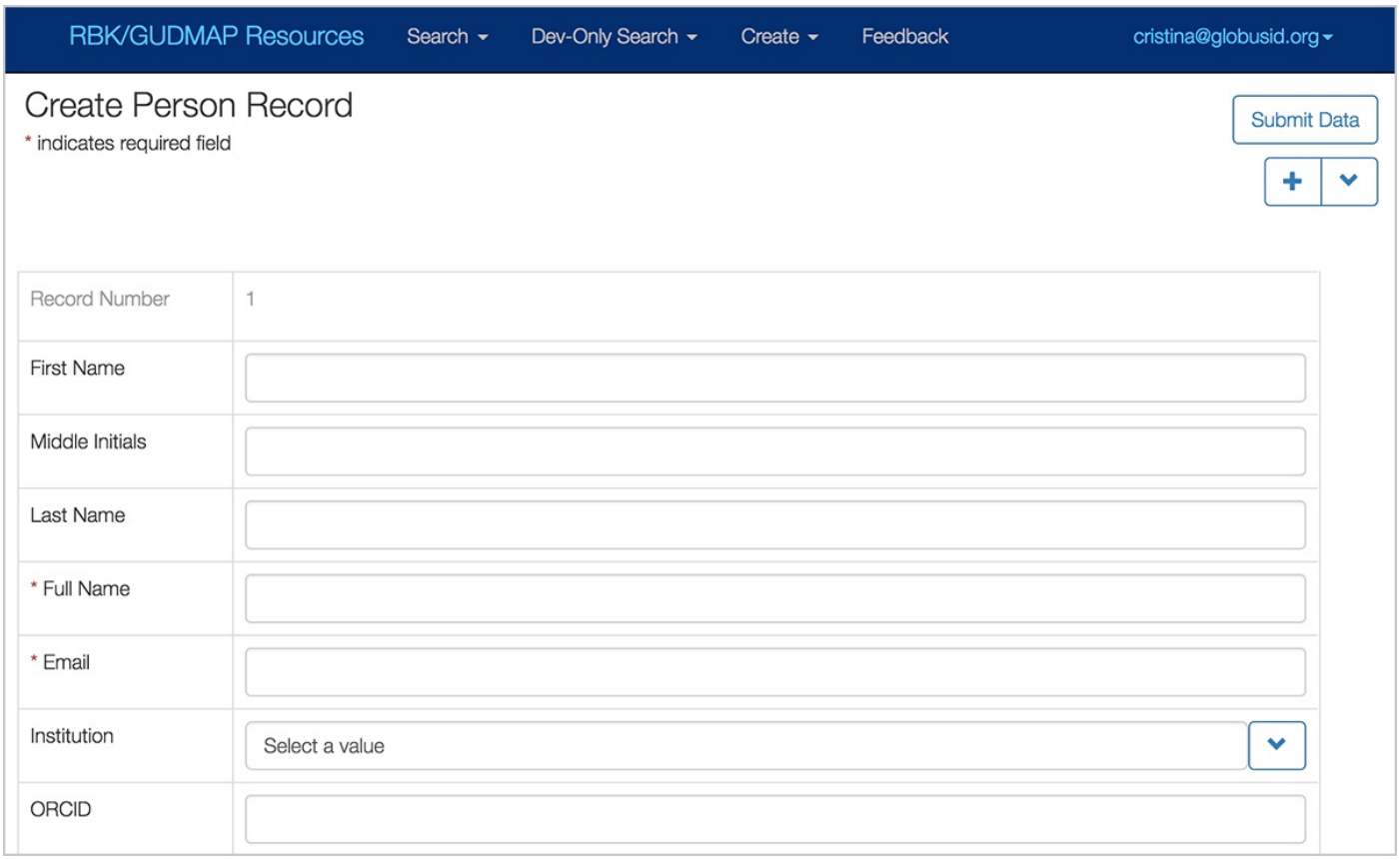
- In the *Correspondence Author* field, select 'false' or 'true' to indicate whether this author is the contact person for this protocol.
- In the *Author* field, click "Select a value". In the modal window (next image), Search for the person you want to add and select them.



- If you cannot find the author, click the "+" button to create a new author record.



A "Create Person Record' tab appears.



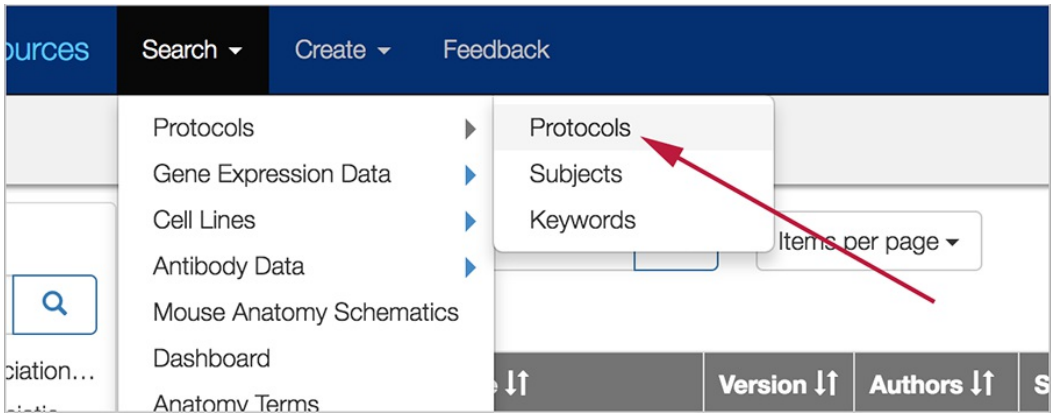
- Add the author's full name and email address at the minimum.
- Click **Submit Data**. Close this tab.
- In the previous tab and click the checkbox to select the new author, and click **Submit Data**.

5. Add Figures

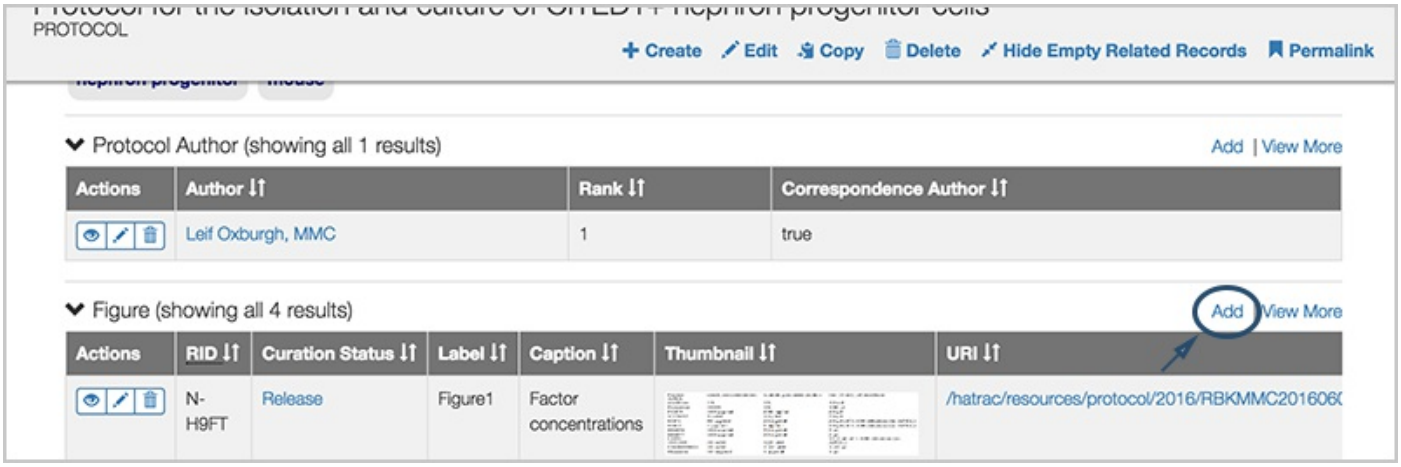
Note: The 'Figures' section was primarily intended for adding images to a protocol but is also useful for videos or other supplemental files. For simplicity, we'll refer to image files below.

The process of adding image files to a protocol is two-fold: you add the file to the *Figures* section and then embed it where desired in the base protocol.

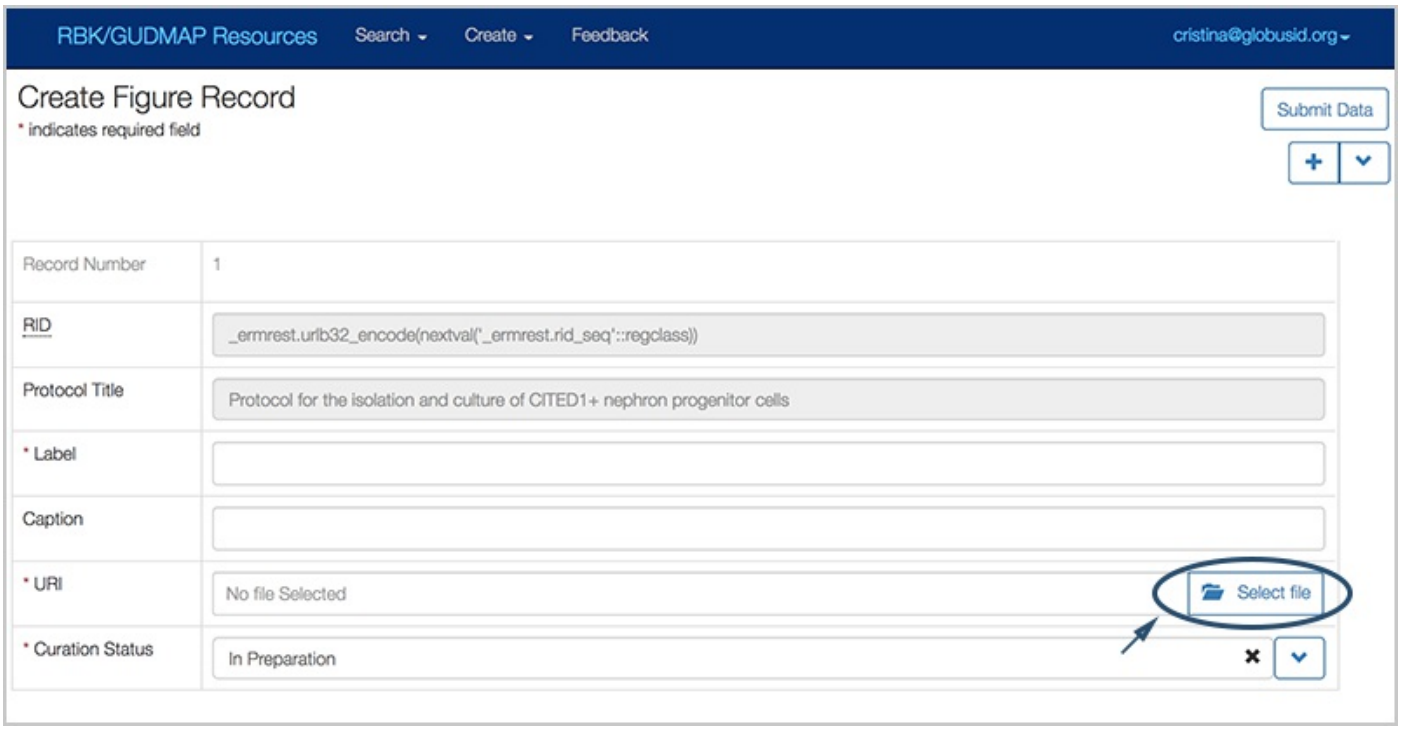
- Make sure you are logged in, then navigate to the protocol where you want to add the figure (in the navigation bar, click *Search* > *Protocol* > *Protocol*).



- Scroll down to the *Figures* section and click **Add**. A new tab appears with a form.



- Fill in the fields and then upload your figure in the *URI* field by clicking **Submit File**, navigating to your file and clicking **Open**.

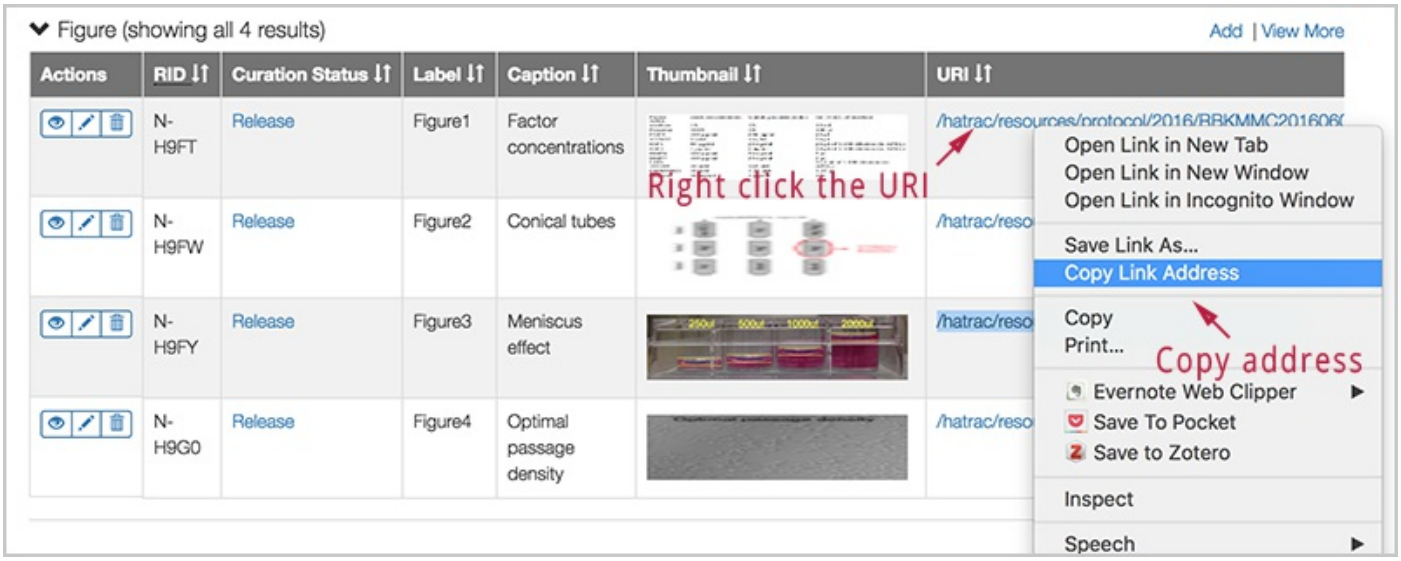


- Save the record by clicking *Submit Data*. Your figure now appears in the *Figures* section.

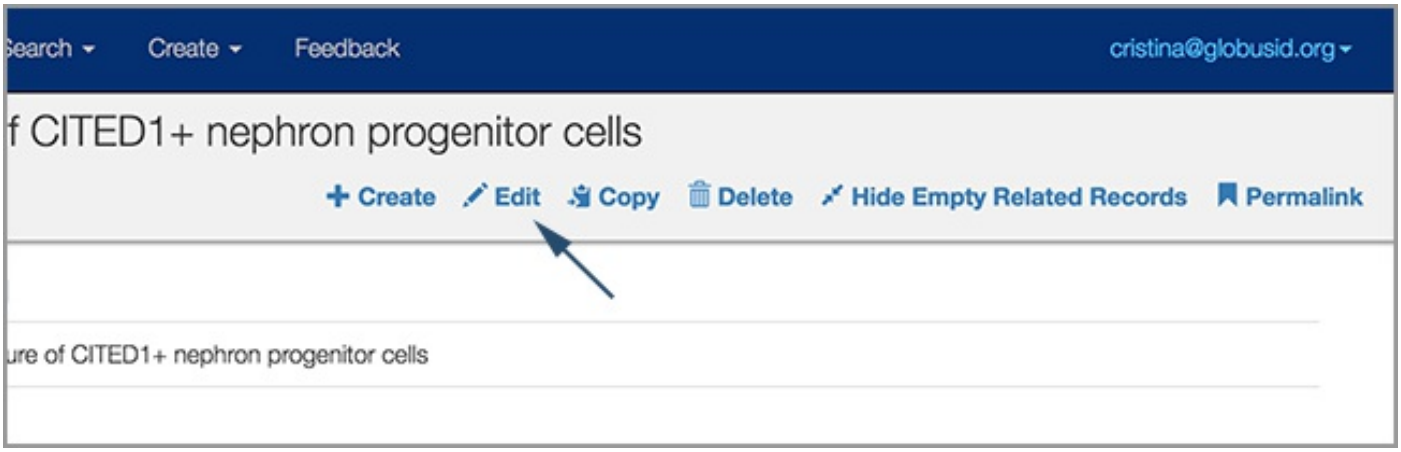
6. Embed Figure in the Protocol

Note you can only embed an image file. For video files, you may only add a link to the URI for the figure (for information on how to add a link, see Formatting with Markdown).

- In the *Figures* section, copy the *URI* field (the link to the image on our system).

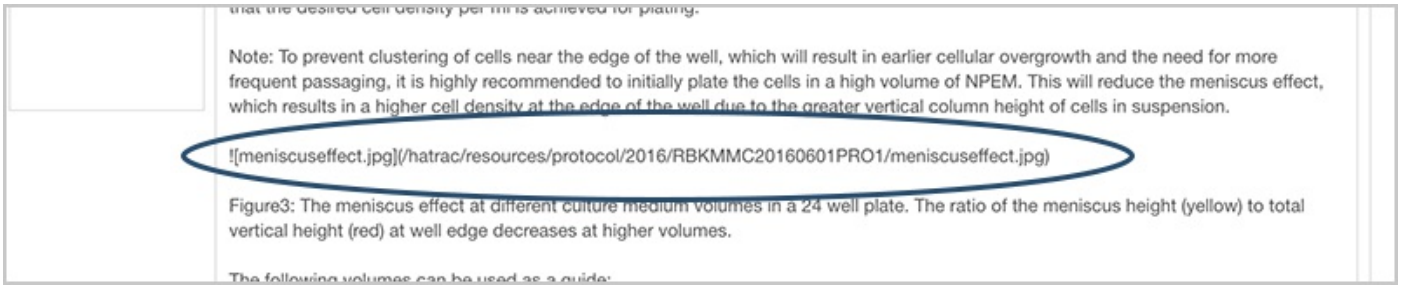


- Scroll back up to the top of the protocol and click **Edit**.

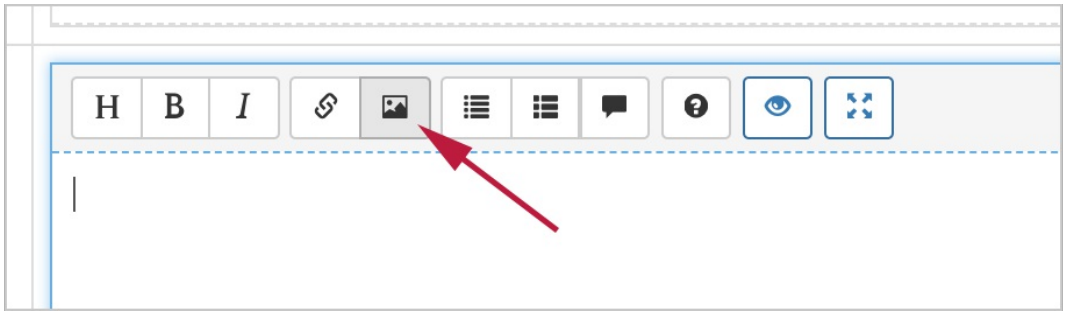


- In the desired field, use the following Markdown format (similar to a markdown link but with an exclamation point at the beginning):

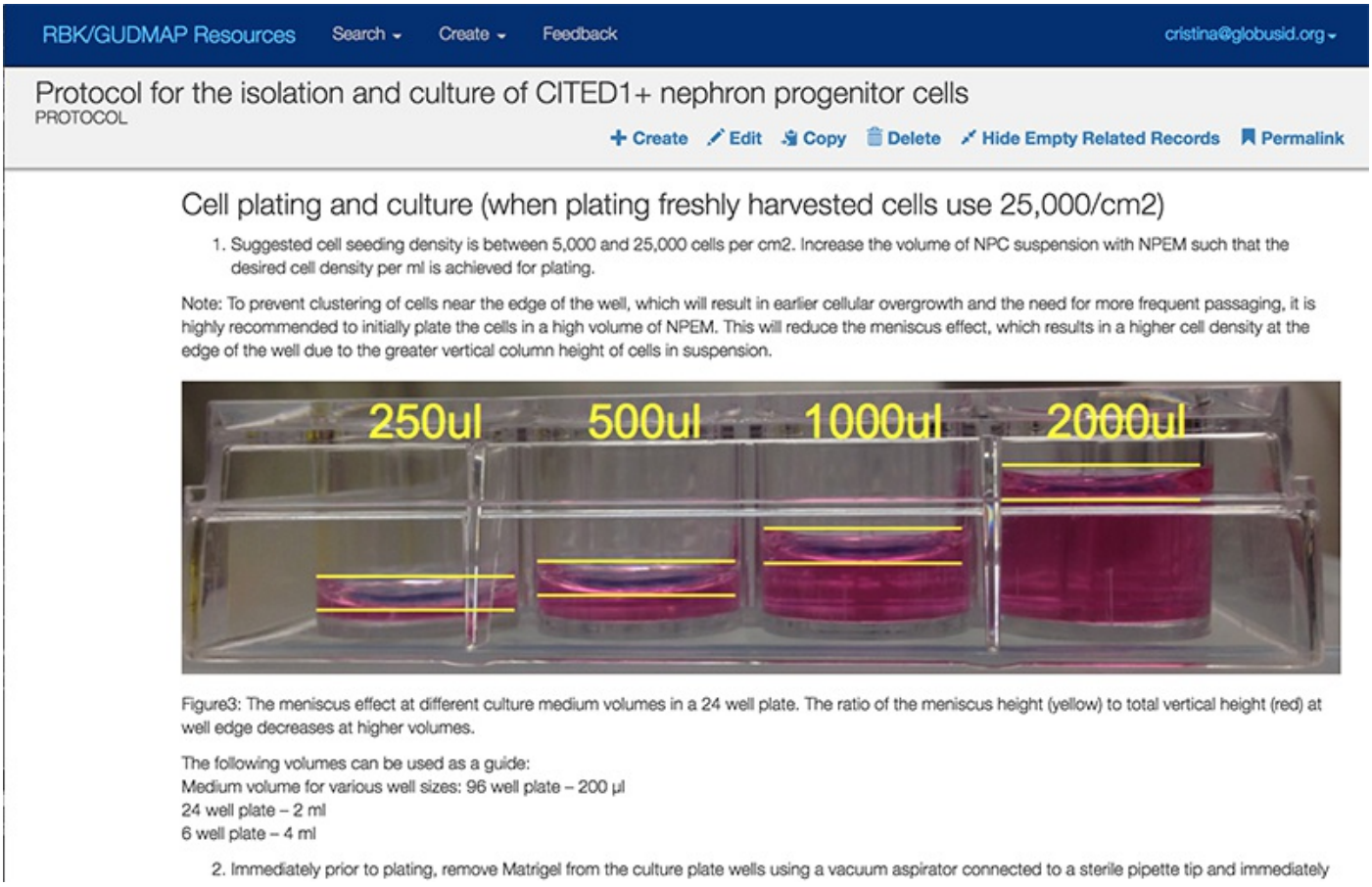
```
![alt text](URI-of-image-you-uploaded)
```



You can also click the Images icon in the formatting toolbar and paste the URL in the popup window.



- Your figure now appears in the text field.



7. Reviewing and Submitting Protocols

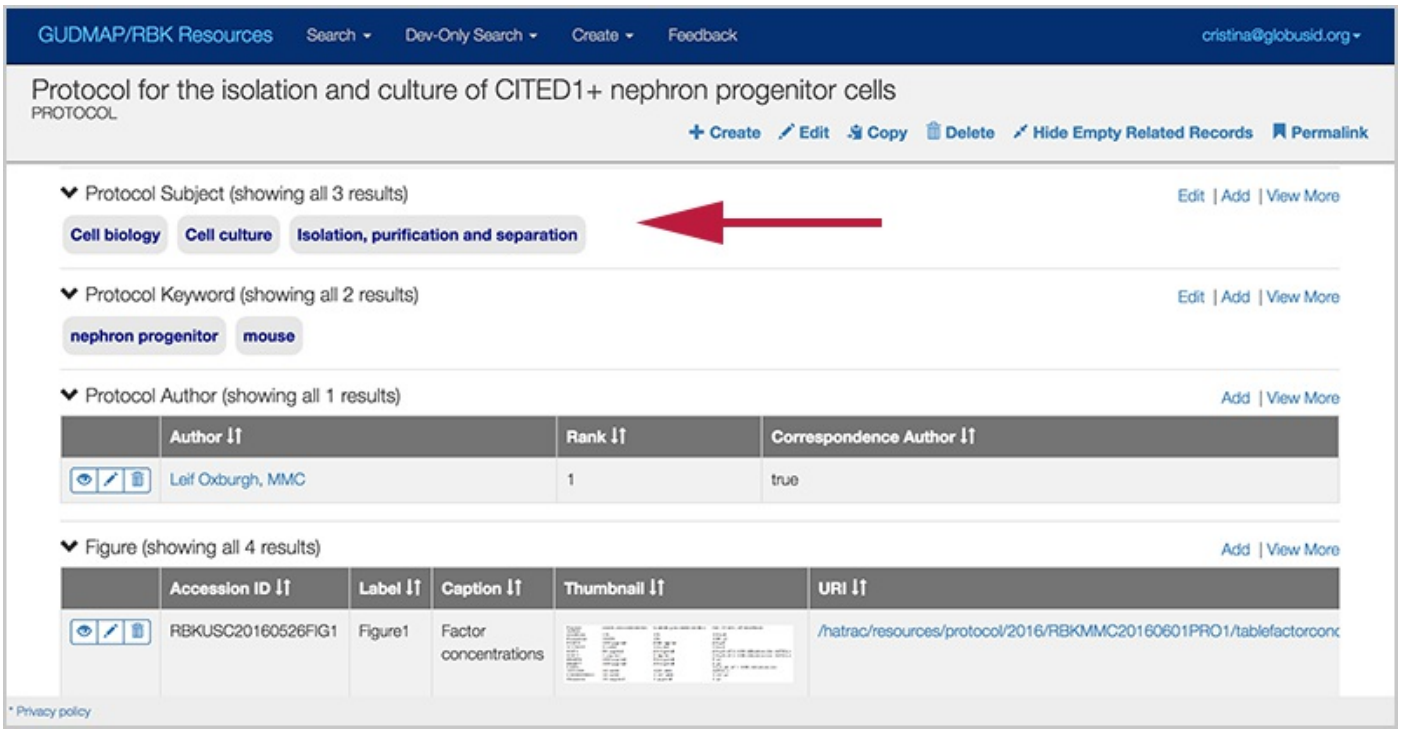
Note: By the hard launch of the new GUDMAP site in April, there will be dashboards and email notifications to make this process more straightforward. In the meantime, here is how a project's PI or designated reviewer can find their project's data with a Curation Status of "PI Review"

- Make sure you are logged in.
- From the navigation bar, click *Search* > *Protocol* > *Protocols*.
- In the faceting sidebar on the left, scroll to **Curation Status** and choose *PI Review*. Note: Keep in mind that the data submitter may have forgotten to set the Curation Status field, in which case the status would still be *In Preparation*.
- In the faceting sidebar, scroll to **Principal Investigator** and choose your project's PI. Now you should see the data you need to review.
- When your record is approved internally, change *Curation Status* to *Submitted* to send it to the Hub (click here for the full Curation Workflow).

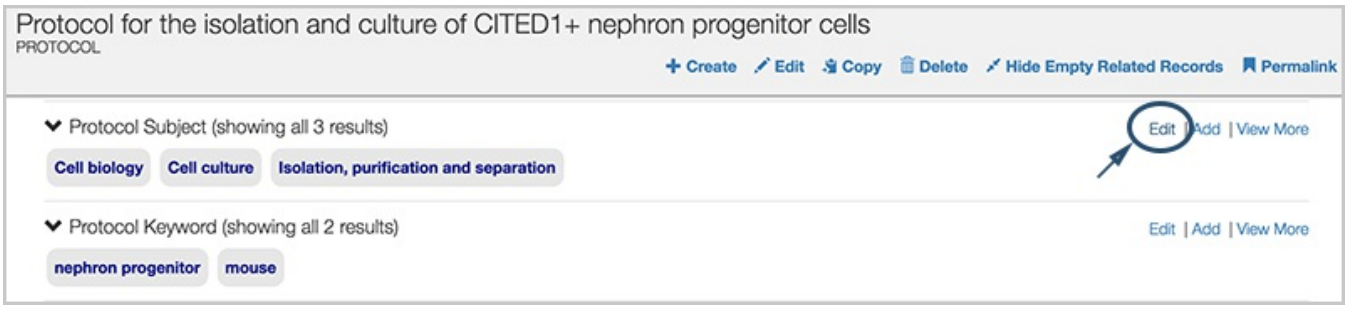
8. Deleting Protocols

Before you can delete a protocol, you must first unlink (delete) any records associated with it. This means 'un-linking' the keywords, subject terms and authors.

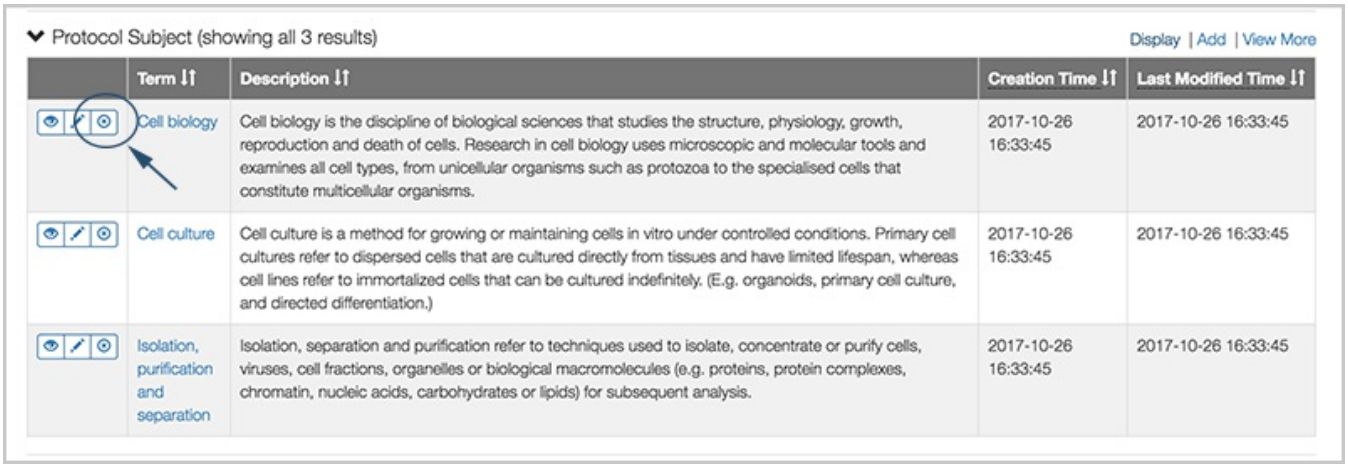
- First, make sure you navigate to the protocol you wish to delete and are logged in.
- Scroll down below the base protocol until you see the 'Protocol Subject', 'Protocol Keywords', 'Protocol Authors' and 'Figures' sections.



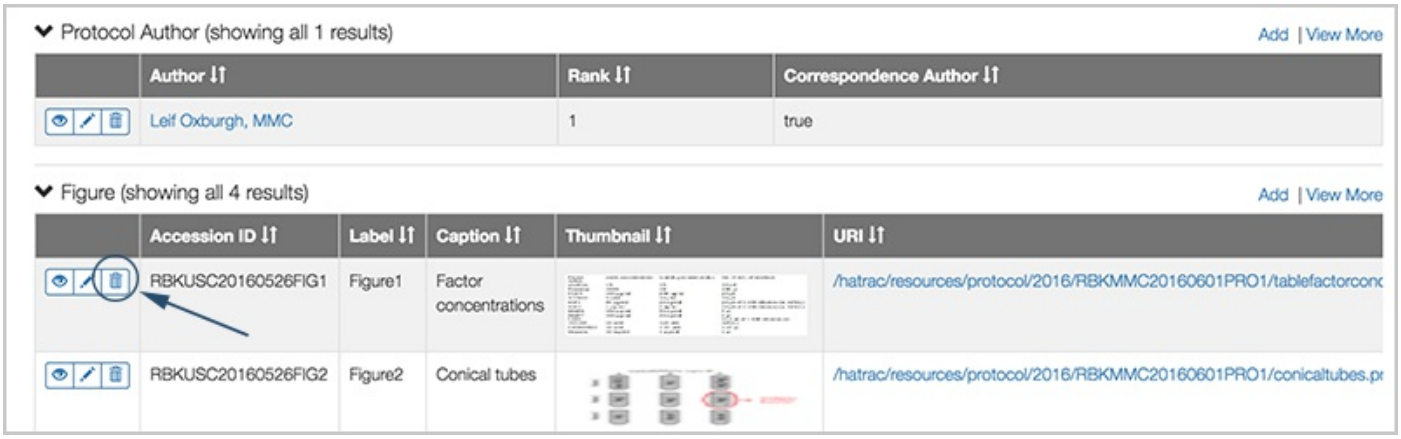
- For the 'Protocol Subject' and 'Protocol Keywords' sections, click *Edit* in the upper right corner of the section.



Then click the "x" icon in the Actions columns to delete (un-link) each and every record in that section.



- For the 'Protocol Authors' and 'Figures' sections, click the 'garbage can' icon to delete each and every record in that section.



- Once all of the related records are deleted, scroll back up to the top of the protocol and click the "Delete" link.