

## **NGEE Arctic Metadata Entry and Data Upload Tool Tips**

The NGE Arctic Metadata Entry and Data Upload Tool makes it easy to describe NGE Arctic data in a standardized way and enables these metadata records and uploaded data to be searchable in the internal NGE Data Search tool (coming soon). The metadata record provides context to the data and facilitates the (re)use of the data.

### **CONTENTS**

Accessing Tool .....	2
Support .....	2
Instructions.....	3
Landing Page (Home) .....	3
Navigation .....	4
How to Save, Delete, Preview and Submit a Record .....	4
Information Requested in the Tool .....	6
Dataset Title .....	6
Contact Information.....	6
Status of the Dataset.....	7
Description of the Dataset .....	7
Time & Place.....	7
Keywords.....	9
Data Quality .....	9
Methods and Processing Steps .....	9
Analytical Tools .....	9
Data Upload .....	10
FAQs.....	11

## ACCESSING TOOL

### Preferred Browsers

- Firefox
- Chrome
- Safari

### Tool available at

- Direct link - <http://ngee-arctic.ornl.gov/ngeemetadata/>

### Log in

- New users may request an account from a link on the log in page
  - A default password will be sent to new accounts. Please change it after logging in.
- User name: your 'lastname\_firstname'
- **NOTE:** The log in is not the same as the NGEE Arctic website/portal log in.



The screenshot shows the login interface for the NGEE Arctic Metadata Entry Tool. At the top, there is a header with the NGEE Arctic logo and the text "NGEE Arctic Next-Generation Ecosystem Experiments". To the right of the logo, it says "Advancing predictive understanding of Arctic ecosystems in response to climate change...". Below the header, the main title is "NGEE ARCTIC Metadata Entry Tool" with a subtitle "For describing field, laboratory, remote sensing, and modeling data products." The login section is titled "Login" and contains the following elements:

- Username:
- Password:
- Buttons: "Sign in", "Help", and a checkbox for "Stay signed in" (which is checked).
- A link: "Click here to request an account!"

## SUPPORT

NGEE Data Management support - [support@ngee-arctic.ornl.gov](mailto:support@ngee-arctic.ornl.gov)

## INSTRUCTIONS

Expect the tool to be modified and additional fields included as the data team gathers feedback.

### LANDING PAGE (HOME)

1. Edit Your Metadata Files – an alphabetical dropdown list containing all metadata records that you have created and are still editing
  - a. Select a record and hit “Load File”
  - b. The files listed here are either:
    - i. Records saved as draft
    - ii. Records submitted
  - c. The opened record will have a status note at the top
  - d. Approved records do not appear in this list
2. Create a New Metadata Record – select this option to create a new metadata record
  - a. Start a new record with a blank form
  - b. To create a new record using an existing record as a template
    - i. Select the record to use as a template from the Metadata Files dropdown list
    - ii. Open the file, change the title and make edits
    - iii. Save the record with the new title
3. Upload an Existing Metadata File – select this option to upload an XML-formatted metadata file from your local computer
  - a. Selecting this option will open a browse window
  - b. The XML must be in Federal Geographic Data Committee (FGDC) standard format
  - c. There is an option in the tool to save a metadata record locally and reload through this method. Records are saved locally in FGDC format.
    - i. Select Upload an Existing Metadata File and browse to record then click upload to open
4. Help – a tutorial document in PDF
  - a. This button appears throughout the tool
5. Change Password
  - a. New users – please change the default password
6. Logout

**NGEE Arctic**  
Next-Generation Ecosystem Experiments

Advancing predictive understanding  
of Arctic ecosystems  
in response to climate change...

**NGEE ARCTIC Metadata Entry and Data Upload Tool**

[Help] [Change Password] [Logout]

**Edit Your Metadata Files:**

Your ID:

Metadata Files: \*

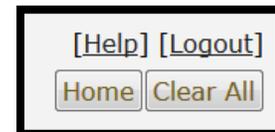
**Create a New Metadata Record:**

**Upload an Existing Metadata File:**

## NAVIGATION

- Navigate the tool using the left-side navigation menu
  - Each menu item corresponds to a metadata section
  - [Review and Submit](#) - see the entire record on one page
  - [Save and Submit](#) - only available on the [Review and Submit](#) page
- 
- [Help](#) – a tutorial document in PDF
    - This button appears throughout the tool
  - [Logout](#) will log the user out of the tool
  - [Home](#) navigates to the NGE Arctic Metadata Entry and Data Upload Tool landing page
    - **NOTE:** There is a prompt to save the current record before navigating Home or changes will be lost.
  - [Clear All](#) clears the current record.

Contact Information
Status of the Dataset
Description of the Dataset
Time and Place
Keywords
Data Quality
Methods and Processing Steps
Analytical Tools
Data Upload
Review and Submit



## HOW TO SAVE, DELETE, PREVIEW AND SUBMIT A RECORD

[Buttons at the bottom of each page]



### Preview Metadata

1. Preview the record in as an XML-formatted metadata file

### Save Locally

1. Save a copy of the record on your local computer
2. Record will save as an XML-formatted metadata file
3. The Title of the metadata record becomes the filename
4. Only the Title is required to save the record locally
5. To edit a record at a later time using the tool, load the record from the Home page by selecting [Upload an Existing Metadata File](#).
  - a. **NOTE:** Editing within the XML-formatted metadata file is only recommended for users that are familiar with working in XML.
6. **NOTE:** Note when a record is initially saved locally there are no underscores in the filename. Once the record is saved as a draft or as an approved record the spaces become underscores. If saved locally again in the same directory, the file will appear to be new and not attempt to overwrite the previous version.

## Save as Draft

1. This saves a draft of the record within the tool to the NGE Arctic server
  - a. Must have all required fields complete (these are marked with a red asterisk)
  - b. TBD is an acceptable entry

- c. A successful save returns a window with “XML File Saved as Draft!”

2. The Title of the metadata record becomes the filename
  - a. **NOTE:** Note when a record is saved, an underscore will replace spaces and special characters in the filename.
3. This record will be available in the alphabetically arranged dropdown list on the Home page under Upload an Existing Metadata File.

## Delete

1. Deletes the currently open record.
2. A deleted record is most likely retrievable
  - a. Send a support request to [support@ngee-arctic.ornl.gov](mailto:support@ngee-arctic.ornl.gov) with a descriptive subject line
  - b. Include the title of the deleted record and the time/date it was deleted.

## Save and Submit

1. This button is only available after navigating to the Review and Submit page.
2. It is available at the bottom of the page.

3. The user will receive an email confirming the record was saved.
  - a. The metadata files are saved on the NGE Arctic server.
4. The Data Team will review the record for metadata consistency.

5. If there are issues, questions or suggested content edits, a member of the Data Team will contact the Metadata Contact.
  - a. If there are content changes needed to the metadata record, the Metadata Contact will need to make the corrections and resubmit the record.
  - b. The Data Team may make editorial and minor metadata consistency changes.
6. After approval, the record will be available automatically harvested and in the NGEE Data Search tool (coming soon)

## INFORMATION REQUESTED IN THE TOOL

\* Required field.

The following is a summary of the types of information requested and will help in preparing a complete, comprehensive metadata record. There are some required fields which are noted in the tool and in the summary.

### DATASET TITLE

Provide a descriptive title that includes what, where, and when.\*

- The Title will be the name of your Metadata File
- Spaces and punctuation will become “\_”
  - For example
    - Vegetation Community Composition, Barrow, 2013  
Vegetation\_Community\_Composition\_\_Barrow\_\_2013.xml
- All draft and submitted records of a user appear in the [Edit Your Metadata Files](#) dropdown list on the tool’s home page and are sorted alphabetically

**What is the Title of the Dataset? Include "what", "where", and "when" in the title.\***

*The Title will also be the name of your Metadata File. Spaces and punctuation will become "\_". For example, Title: Vegetation Community Composition, Barrow, 2013 will be Filename: Vegetation\_Community\_Composition\_\_Barrow\_\_2013.xml*

### CONTACT INFORMATION

Provide contact information for the following (it is possible to have the same individual entered for all three entries):

- For all of the contact fields, there is a type-ahead feature in the name field
  - Starting typing a name and the tool will offer a dropdown list of options
  - Select the name and fields will auto-populate with information coming from the NGEE Arctic Project Participants Database
  - Add new names or make edits to auto-populated information and when the record is saved the data will automatically be saved to the NGEE Arctic Project Participants Database
- Metadata Contact - individual creating the metadata record\*
  - Strictly the person generating the metadata record.
  - The “Full Name” field will offer a list of names as a type-ahead feature. If your name is available in the dropdown, select your name and the contact information will automatically populate

many of the fields. Review the information and make corrections/additions as needed. If your name is not available, enter the information and it will be available in the future after a record is saved.

- Dataset Creator - individual(s) who developed the dataset
  - The “Dataset Creator” may be the principal investigator, data technician, or another team member
  - List everyone else involved in the creation of the dataset
    - Include team members, field/lab assistants, non-project people, etc.
- Data Point of Contact - individual who is the dataset contact\*
  - List a specific contact that can answer detailed questions about the dataset.

## STATUS OF THE DATASET

Provide information about the dataset:

- What is its status – ongoing or complete?\*
- Will it be updated and how frequently?
- Is it published?
- Are there any restrictions in accessing or using the dataset?
  - Address restrictions for internal NGEE project use
  - Address restrictions for external use

## DESCRIPTION OF THE DATASET

Provide the following details about the dataset:

- Abstract\*
- Purpose\*
  - Why were the data collected?
  - Example: Data were collected to improve our understanding of biogeochemical process integrated with climate and earth system models.
- Describe how to use the data
  - For GIS and gridded products, include relevant geospatial information
- In what form is the data presented?\*
- Data and Map
  - In situ Field Measurements
  - Laboratory Analysis
  - Model Inputs and Outputs
  - GIS Products
  - Remote Sensing
- Publication
- Software and Tools
- Others

## TIME & PLACE

Provide the time period and spatial information for the dataset.



## KEYWORDS

Provide general search and discovery keywords (note if using a particular thesaurus as a resource):

- Primary measurement and variables
  - The Primary measurement field can also hold the name of a particular thesaurus with the keywords selected from the thesaurus entered in the variable field. Primary measurements/keywords should be to the specificity of the dataset.
  - The tool provides some type-ahead suggested values pulled from:
    - GCMD Keyword version: 8/0. Revision: 2013-07-03
    - Climate and Forecast (CF) Metadata Convention, Version 23, 23 March 2013
- Place name
  - Select names as from a gazetteer.
- Stratum
  - Examples:
    - Biosphere: Forest (Root Zone)
    - Cryosphere: Frozen Ground (Permafrost)

## DATA QUALITY

Provide an assessment on the quality of the dataset including:

- Uncertainty – How accurate is the data? Is there a bias?
- Consistency – Were tests run to find data inconsistencies?\*
- Completeness – Is there anything missing that might be expected?\*
- If cloud cover was a factor, provide a percent cover.

## METHODS AND PROCESSING STEPS

Provide information about the methods, events, existing data sources, and processing steps that contributed to the development of the dataset.

- Summarize any field, lab or analysis methods
- Provide citation information on the standard or published protocols/methods used
- Provide source information for existing datasets used in the development of this dataset
- List each processing step used to create the dataset

## ANALYTICAL TOOLS

Provide a brief description, contact information, citation and accessibility information for each tool, model or statistical procedure used in the development of this dataset.

## DATA UPLOAD

Provide online links, Digital Object Identifier (DOI) (if available), data, documentation and images:

- Data Link
  - Include links to the dataset published with a journal article and/or is available from a repository or website
  - Include links to published dataset cited under “Status of the Dataset” section in the tool
  - Include links to datasets in the NGE Arctic File Manager
- Uploaded Data File
  - Accepted files: csv, txt, xml, xlsx, xls, pdf, jpeg, png, zip
  - Additional extensions are available upon request
  - Maximum file size 1GB

\* Required field.

## FAQS

1. If I have questions, how do I contact someone?
  - a. Send an email to [support@ngee-arctic.ornl.gov](mailto:support@ngee-arctic.ornl.gov) with a descriptive subject line
2. How do I create a new record?
  - a. Navigate to <http://ngee.ornl.gov/ngeemetadata/>
  - b. Login
  - c. Select the Create a New Metadata Record option from the Home page and this will open up a blank record.
3. How do I edit an existing record?
  - a. On the Home page, click scroll through the Metadata Files dropdown list and select the record to edit.
  - b. Approved records are not available in the dropdown list
  - c. Click the Load File button.
4. Can I use an existing as a template to create a new record?
  - a. Yes, it is possible to use an existing record as a basis for a new record.
  - b. On the Home page, select and load the record to serve as the basis (template) for the new record.
  - c. Scroll to the bottom of the screen and click on Save Locally
  - d. Click Home in the top right corner.
  - e. On the Home page, click Upload an Existing Metadata File
  - f. Browse to the location of the locally saved record to serve as a template
  - g. Click Upload Metadata and Open
  - h. Change the title and make any other edits then save in the manner needed.
5. How do I delete a record?
  - a. Open the record you want to delete.
  - b. Click the Delete button which is located at the bottom of the page in the record.
  - c. There will be a prompt for confirmation.
6. Why will my record not save as a draft or submit for approval?
  - a. Most likely a required field is blank (these are marked with a red asterisk)
  - b. Look for the following message in red italics - "This field is required"

#### Data Point of Contact

Data Contact: \*

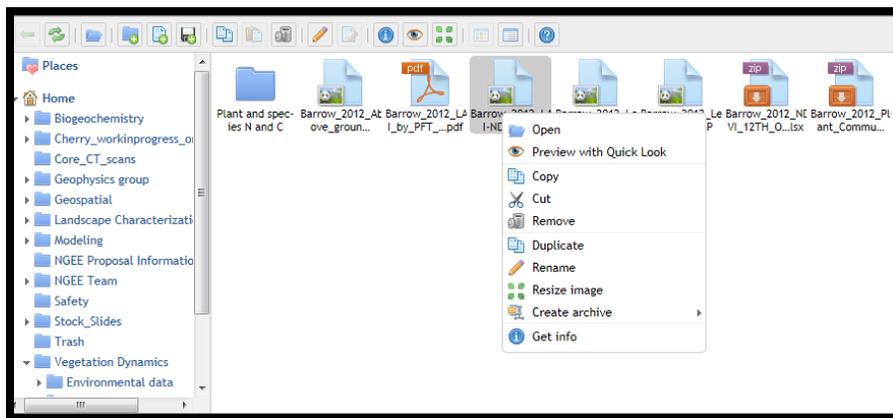
*Please provide the name of the individual to contact with questions about the dataset.*

*This field is required.*

7. How do I find one of my existing records?
  - a. On the Home page, click scroll through the Metadata Files dropdown list and select the record to edit.
  - b. Click the Load File button.
8. How do I find an existing record for someone else?
  - a. Coming soon
9. Can I edit someone else's record?
  - a. There are two options:
    - i. Option 1:

1. The metadata contact (user that entered the record) will have to send you the metadata record.
  2. Metadata Contact - on the Home page, select and load the record.
  3. Scroll to the bottom of the screen and click Save Locally
  4. The downloaded file can now be shared.
  5. There are two ways to edit the record:
    - a. Edit record in the tool
      - i. On the Home page, click Upload an Existing Metadata File
      - ii. Browse to the location of the locally saved record
      - iii. Click "Upload Metadata and Open"
      - iv. Make any additional edits then save in the manner needed.
      - v. This saves the record into a new user space and the previous user will no longer have access to the record.
    - b. Edit record outside the tool in a text editor
      - i. Using a text editor, make changes directly in the XML file.
      - ii. *This method is only recommended for users that are familiar with working in XML.*
      - iii. Make edits and either:
        1. Send the metadata record back to the Metadata Contact for upload
        2. Upload the record using the tool
      - iv. Go to the Home page, click Upload an Existing Metadata File
      - v. Browse to the location of the edited record
      - vi. Click "Upload Metadata and Open"
      - vii. Make any additional edits then save in the manner needed.
  - ii. Option 2
    1. Send a support request to [support@ngee-arctic.ornl.gov](mailto:support@ngee-arctic.ornl.gov) with a descriptive subject line
    2. Request the record be moved from one user's folder to another user's folder
    3. Provide the name of both users and the name of the metadata record
    4. The record now resides in the editor's folder and the previous user no longer has access to the record.
10. Can I download the record to edit locally?
- a. *This method is only recommended for users that are familiar with working in XML.*
  - b. On the Home page, select and load the record.
  - c. Scroll to the bottom of the screen and click on Save Locally
  - d. The file is in XML format and must be viewed in a text or XML editor.
11. How do I get a copy of the record for my files or to send to someone else?
- a. If the record has been approved, it is available on the NGEE Data Search tool (coming soon)
  - b. If the record has not been approved, it is available from with the tool.
    - i. On the Home page, select and load the record.
    - ii. Scroll to the bottom of the screen and click on Save Locally
    - iii. The file can now be shared.
    - iv. The file is in XML format and must be viewed in a text or XML editor.
12. I accidentally deleted a record, can I get it back?
- a. Send a support request to [support@ngee-arctic.ornl.gov](mailto:support@ngee-arctic.ornl.gov) with a descriptive subject line
  - b. Include the title of the deleted record and the time/date it was deleted.
13. The person that created the metadata record is no longer with my group, how do I access and update the records they created?

- a. Send a support request to [support@ngee-arctic.ornl.gov](mailto:support@ngee-arctic.ornl.gov) with a descriptive subject line
  - b. Include the name of the person that entered the metadata records and the name of the person who will be taking over responsibility for those records.
14. How do I save a record?
- a. There are three options:
    - i. Save Locally
      1. Saves the record to the user's computer
    - ii. Save as Draft
      1. Saves the record to the NGEE server
    - iii. Save and Submit
      1. Saves the record to the NGEE server for review by the NGEE Data Team
15. How do I find and access the actual data?
- a. If the record has been approved, it is available after log in on the NGEE Data Search tool (coming soon)
16. How do I find the URL/online link for a file in the NGEE Arctic file manager on the NGEE Arctic Portal?
- a. Log into the NGEE Arctic portal
  - b. Drill down to the file
  - c. Right click the file select "Get Info"



- d. Click the link at the bottom of the popup window.



- e. Right click on the link and copy shortcut. Paste it into the "Online links" field.