CSR BACK-OFFICE: USER MANUAL

HORIZON *2020*

Deliverable number		Short title	
		CSR BACK-OFFICE User manual	

Long title	
CSR BACK-OFFICE User manual	

Short description	
CSR BACK-OFFICE is an online tool which enables to create and update CSR entries This document is the detailed user manual of CSR BACK-OFFICE.	

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Dissemination	Copyright terms
Public	

History

Version	Authors	Date	Comments
1.0	Tosello V.	17/05/2021	Creation
2.0	Tosello V.	23/03/2022	Addition of paragraphs 2.4 Submission of CSR entries using online forms and 2.5 Workflow after CSR submission
		29/03/2022	Additional information about track chart referenced in CSR XML files (2.3.2)
2.1	Tosello V.	12/10/2022	Additional information about Measurements and moorings dates (2.4.1.9)

Table of contents

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1. Introduction

Cruise Summary Reports (CSR = former ROSCOPs) are the usual means for reporting on cruises or field experiments at sea. Traditionally, it is the Chief Scientist's obligation to submit a CSR to his/her National Oceanographic Data Centre (NODC) not later than two weeks after the cruise. This provides a first level inventory of measurements and samples collected at sea. Currently, the Cruise Summary Reports directory covers cruises from 1873 till today from more than 2.000 research vessels: a total of nearly 53.000 cruises, in all European waters and global oceans. This also includes historic CSRs from European countries, that have been loaded from the ICES database from 1960 onwards.

For many years, the CSR catalogue has been managed by BSH, Germany. In 2022, the CSR catalogue will be transferred from BSH to IFREMER. In the frame of this transfer, a new on-line tool has been developed to enable to create and update CSR entries in the new CSR catalogue managed by IFREMER: CSR Back-office. This tool is available at https://csr-backoffice.seadatanet.org/
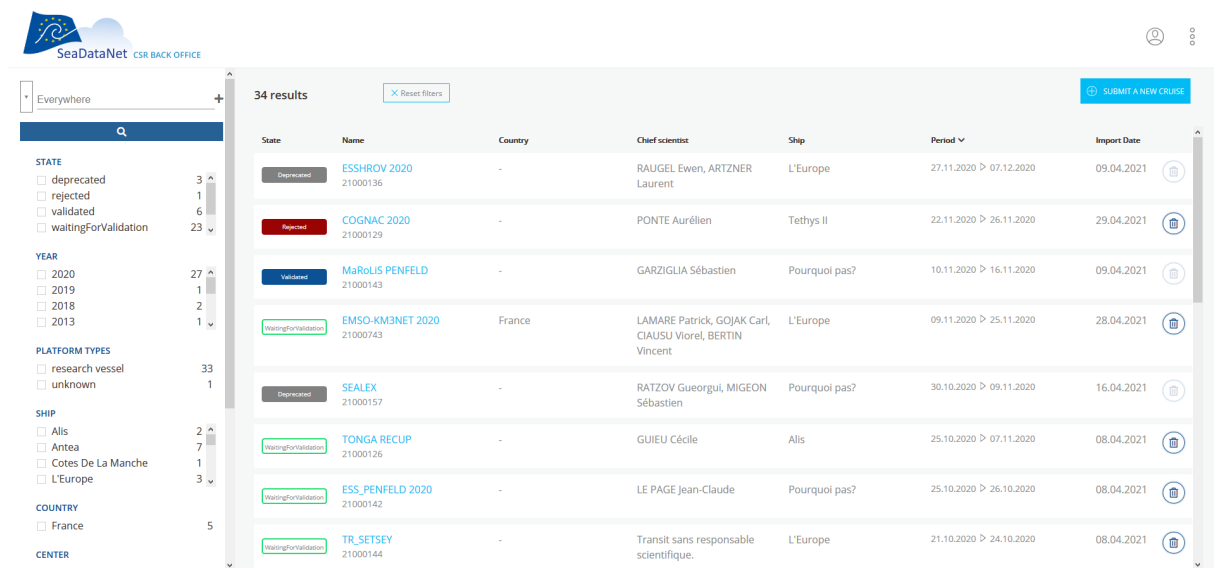

Figure 1 : CSR back-office

The CSR back-office V1, delivered in June 2021, allowed to create and update CSR entries by submitting CSR XML files. The CSR back-office V2, delivered in March 2022 includes on-line forms to replace the current CMS managed by BSH. The corresponding CSR workflow is shown in Figure 2.
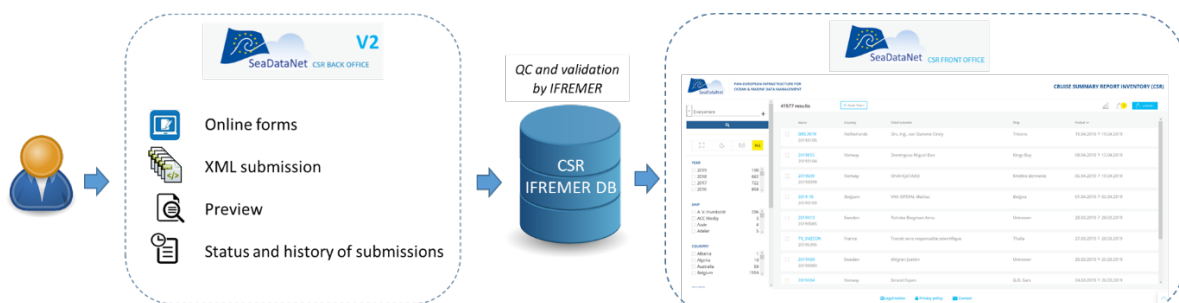

Figure 2 : Workflow including CSR back-office V2 (XML submission + online forms)

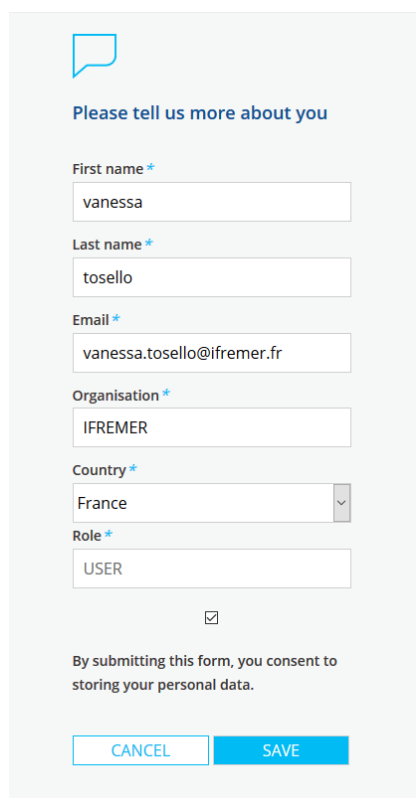# 2. CSR back-office functionalities

2.1. Identification using Marine-id

The CSR back-office makes use of the Marine-id services. Therefore, you are asked to register with marine-id (in order to get a personal login name and password). The marine-id registration includes details such as e-mail address which are required for handling and keeping you informed about the progress of your CSR submissions.

- Register as Marine-id user

- Ask for a new password (if already registered), on marine-id

- Change your personal information (if already registered), on marine-id

At first connection to the CSR back-office, you will be asked to:

- Precise the name of your organization

- Give your consent for storing your personal data (check box)

Please tell us more about you

First name *
vanessa

Last name *
tosello

Email *
vanessa.tosello@ifremer.fr

Organisation *
IFREMER

Country *
France

Role *
USER

☑

By submitting this form, you consent to storing your personal data.

CANCEL   SAVE

Figure 3 : User profile window

2.2. Rights

Once logged in, you will have access to your own CSR entries.

Figure 4: CSR back-office homepage for an user who owns CSR entries

Currently, a CSR entry is associated with only one owner. If in your organization, several people manage the same CSR entries, we recommend you to create a generic marine-id account to manage them.

If you never submitted CSR entries neither in the BSH system nor in the IFREMER one, no CSR entries will be displayed, as shown in Figure 5.

Figure 5: CSR back-office homepage for an user who doesn't own CSR entries

If some of your CSR entries are not displayed in the CSR back-office, it is probably because you have not been identified as their owner. If changes are needed, please contact sdn-userdesk@seadatanet.org.

2.3. Submission of CSR XML files

In the CSR back-office V1, only XML submissions are possible. The CSR submissions using online forms will be possible in the CSR back-office V2 in 2022.
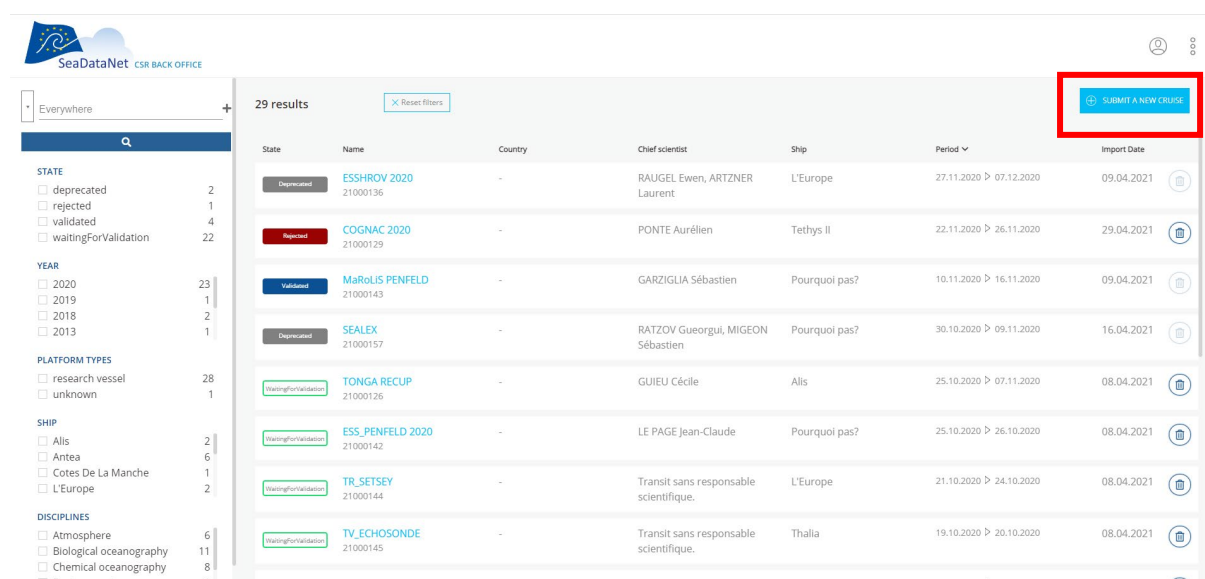
2.3.1. CSR XML format

The required XML format is the SeaDataNet ISO 19139 Cruise Summary Report (CSR) format as described at https://www.seadatanet.org/Standards/Metadata-formats/CSR. You can produce your CSR XML files using the MIKADO software freely available at https://www.seadatanet.org/Software/MIKADO.

2.3.2. Upload

To upload and submit CSR XML entries (new or update):

1. click on "Submit a new cruise" button

Figure 6 : Submit your CSR entries

2. drag and drop your XML files (or a zip containing your XML files) in the CSR back-office interface.

    -   **Attention, for performance reasons: you can only upload 100 files at the same time**.

    -   If your CSR entries are associated with a track chart (PDF or image), you should upload a zip containing your XML files and the corresponding track charts (max 100 files including track chart, max size 5Mbytes) except if the track chart is referenced in the XML file as URL. In that specific case, for security reasons, it may be necessary to include an exception in the CSR back-office to authorizing the track chart downloading (please contact sdn-userdesk@seadatanet.org if you have the following error: "Problem with track chart" when uploading your XML file).
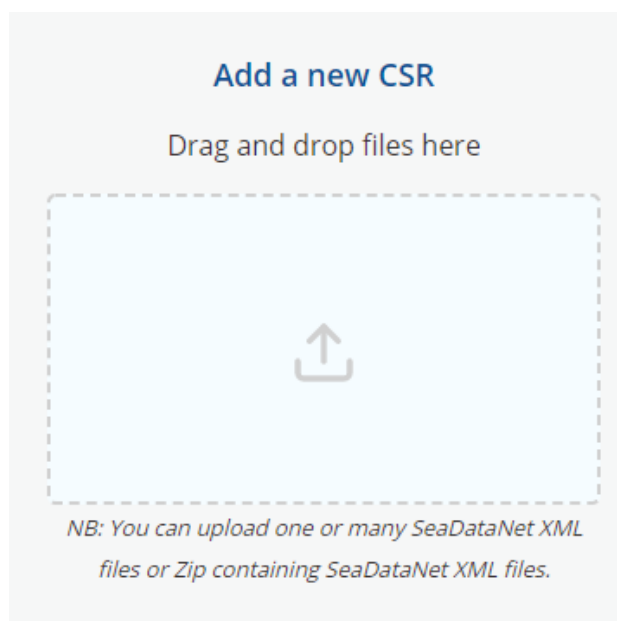
Figure 7 : Upload CSR entries by drag and drop

2.3.3. **XML Validation**

Once you uploaded your CSR XML files, the CSR back-office will perform the following checks:

- **Create/Update**: the CSR back-office will detect automatically if your CSR XML file is a new CSR entry or an update taking into account the EDMO code of the collate centre, the CSR local id and the name of the depositor (owner or not). Note that you will be authorized to update only your own CSR entries and to create a new CSR entry only if this new CSR entry is not a duplicate with an existing one (same name, same ship, same dates). If you tried to update a CSR entry you don't own, you will receive an error message ("Potential duplicates").
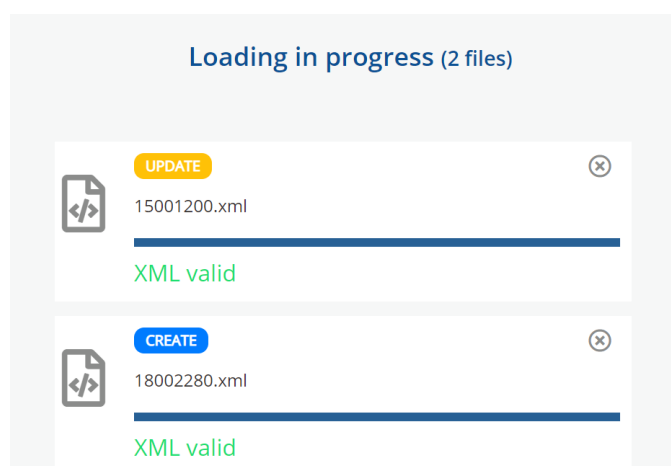
Figure 8 : Create and update detection

- **XML validation**: the CSR back-office will check if your XML file is valid or not.
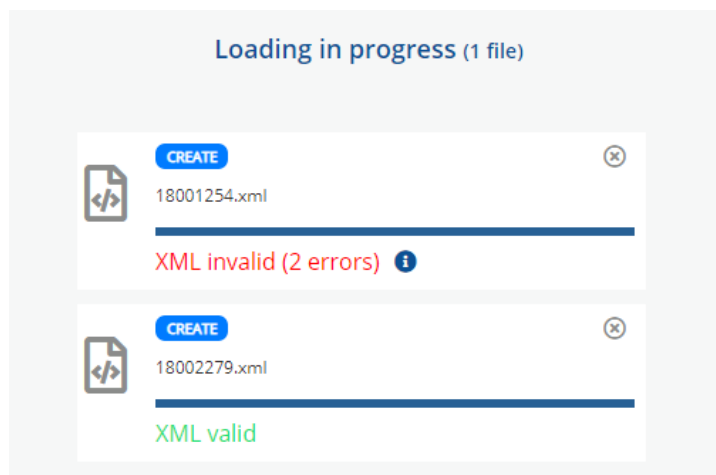
Figure 9 : XML validation

- **Duplicates checks**: the CSR back office will detect the potential duplicates when a CSR XML entry is uploaded
    - ERROR (red message): Same ship, same dates, same names
    - WARNING (orange message)
        - Same ship, same dates, different names
        - Same ship, overlapping dates
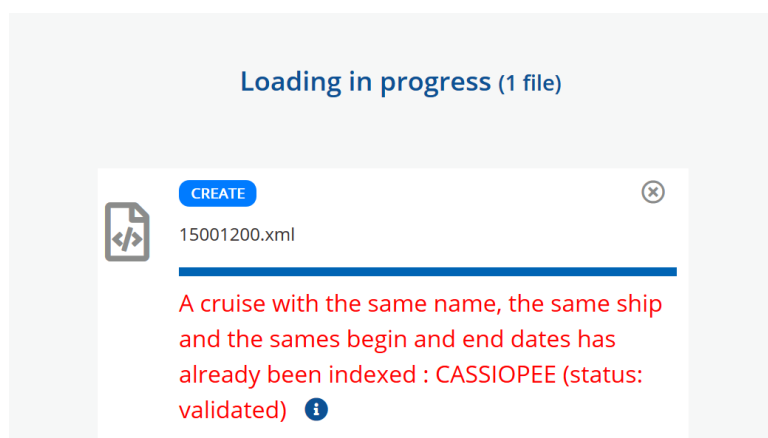
Figure 10 : Detection of Potential duplicate (ERROR)
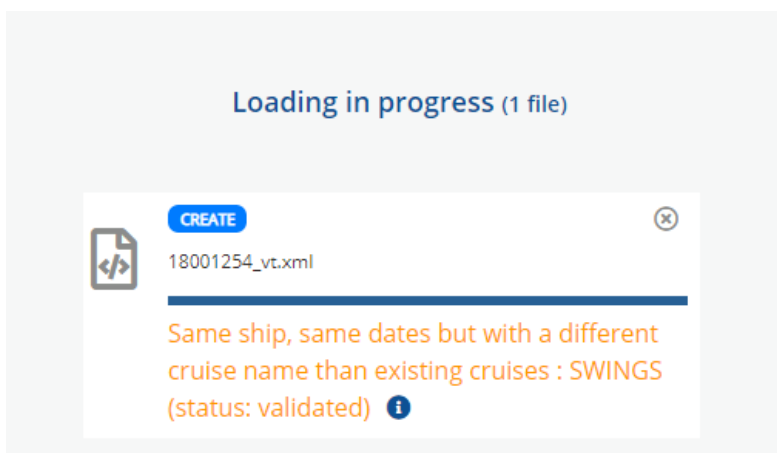
Figure 11 : Detection of potential duplicate (WARNING)
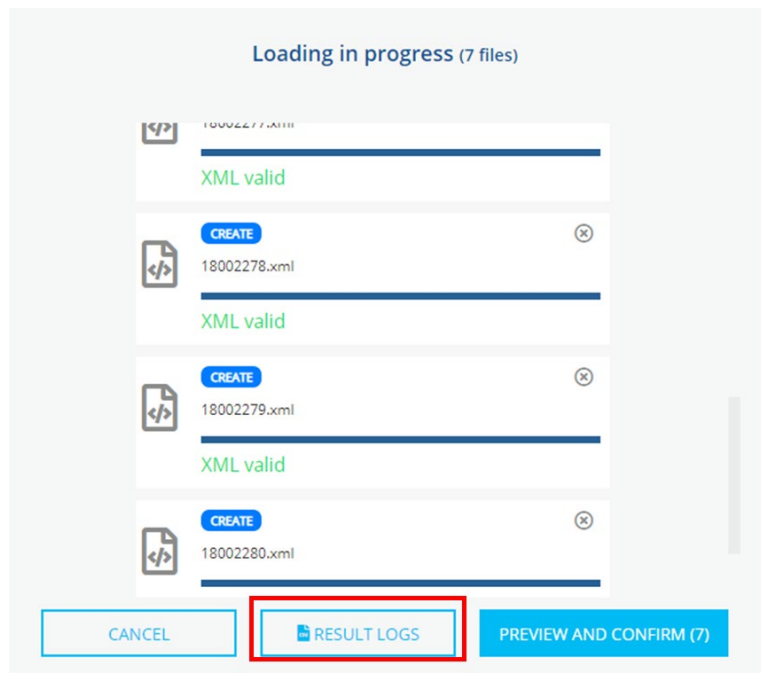
You can download the log report by clicking on "Result logs" button.

Figure 12 : Download the log report

2.3.4. **Preview and submission**

The next step is the preview of your uploaded CSR entries (only valid ones) by clicking on the "Preview and Confirm" button.
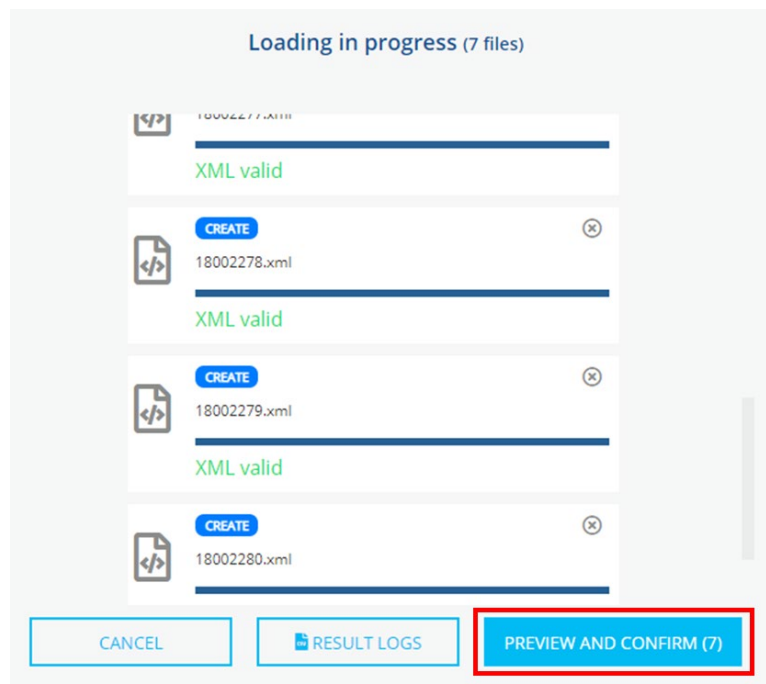
Figure 13 : Access to the Preview window

The preview window is shown on Figure 14.

Figure 14 : Preview of the uploaded CSR entries

On the Preview window, you will be able to check all the fields imported from your XML file and to submit your CSR entries one by one or all together:

- Click on « Submit current » button to submit the current CSR entry

- Or click on "Submit all » button to submit all the uploaded valid CSR entries.

If everyhting goes well, you will have a successful message, as shown on Figure 15 .
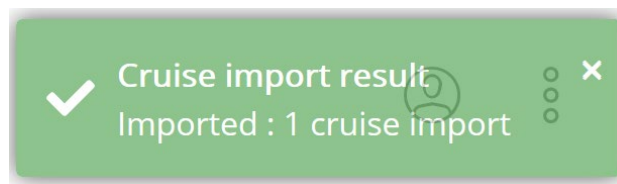
Figure 15: Submission OK - Green message

2.4. Submission of CSR entries using online forms

2.4.1. Creation of a new CSR entry

To create a new CSR entry using the online forms:

1- click on "Submit a new cruise" button

2-   click on 'From empty online form' button

3-   Fill in the online forms.

There are 9 main forms to describe your cruise:
- Identification of the cruise
- Responsible party of the cruise
- Objectives
- Projects
- Parameters and instruments
- Geographical areas
- Measurements
- Moorings
- Other information (data access restriction, documentation)

2.4.1.1. Common screen characteristics

2.4.1.1.1. Mandatory fields

In the different forms, the mandatory fields are highlighted with a blue star:

Name of the cruise * ?

Torungen 1

10/160

Collate centre * ?

Institute of Marine Research, Norwegian Marine Data Centre (612)

Cruise DOI ?

Cruise local id ?

BSH19685242

11/80

Alternative name ?

Figure 16 : Mandatory fields highlighted by a blue star

2.4.1.1.2. Tooltips

The CSR back-office provides tooltips, which give supplementary information in order to help to fulfill the fields. To access tool tips, put the mouse cursor over the question mark, without clicking it, and a small box will appear with supplementary information regarding the chosen item.

Name of the cruise * ?

Torungen 1

10/160

Collate centre * ?

Institute of Marine Research, Norwegian Marine Data Centre (612)

Cruise DOI ?

Cruise local id ?

BSH196852   Unique local identifier of the cruise, given by the data centre or by default central CSR
reference will be inserted after saving the form (max 80)

11/80

Alternative name ?

Figure 17 : Tooltips

2.4.1.2. Identification

The first form to be completed is the Identification form. It includes the following information:
- Name of the cruise (max 160 characters)
- Collate centre: organisation responsible for the CSR metadata creation, should be referenced in the EDMO catalogue
- Cruise DOI: link to the cruise DOI when exists
- Cruise local ID: unique local identifier of the cruise, given by the data centre or by default central CSR reference will be inserted after saving the form (max 80 characters).

- Alternative name or ID of the cruise: alternative name or ID of the cruise (max 80 characters)
- Ship/Platform: ship/platform name (ICES code), C17 vocabulary list
- Start: start date of the cruise
- End: end start of the cruise

Figure 18 : Identification form

Duplicates checks: the CSR back office will detect the potential duplicates:

- ERROR (red message): Same ship, same dates, same names

⚠ A cruise with the same name, the same ship and the sames begin and end dates has already been indexed : FocusX2 (state: validated)

- WARNING (orange message)
  - Same ship, same dates, different names
  - Same ship, overlapping dates

⚠ Same ship, same dates but with a different cruise name than existing cruises : FocusX2 (state: validated)

If no duplicate error appears, the 8 other forms will become active and could be completed.

After saving this form, a draft CSR entry is created:

2.4.1.3. **Responsible party**

The "Responsible" form includes information about the person(s) in charge of the scientific work (chief scientists) and laboratory responsible for coordinating the scientific planning of the cruise.

Figure 19 : Responsible party

2.4.1.3.1. Chief scientists

The first part of this form allows to include information about the Chief scientist(s) and his/her personal address details at his/her present laboratory.

This section allows to select the chief scientists in a list of contacts by searching by first and last name:

1- Click on the "Select button"

2- Enter the first letters of the name of the chief scientist

3- Select the corresponding chief scientist in the list by clicking on the "Select" button

4- Repeat the process for all the chiefs scientists of the cruise

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5- If the desired chief scientist does not appear in the list, you can create it by clicking on the "ADD NEW" button

6- Complete the information about the chief scientist to create and his/her personal address details at his/her present laboratory (EDMO code)

7- Click on "Save" button. The new chief scientist is created and appears in your selection of chief scientists.

8- When all the chief scientists have been selected, click on "Validate and close" button to validate your selection. Then, all the chief scientists appear in the "Chief scientist" section.

2.4.1.3.2. Responsible organisations

The second part of this form allows to select the laboratories responsible for the cruise (originators of the dataset). These laboratories should be referenced in the EDMO catalogue.

  1- Search the desired organisations (by typing their names or their EDMO codes)

  2- Select them by clicking on the "Select button"

If the desired laboratory or organisation is not included in the EDMO catalogue, please contact sdn-userdesk@seadatanet.org.

2.4.1.4. Objectives

This form allows to complete the objectives of the cruise: purpose and nature of the cruise as to provide the context in which the data were collected.

Figure 20 : Objectives of the cruise

2.4.1.5. Other information

In this form, the following information are requested:

- Platform class (L06 vocabulary list)

- Data access restriction: restrictions for accessing and using the resource and metadata (L08 vocabulary list). Several values can be added in this field.

- Link/URL for additional documentation (link to cruise report for example). Several links can be added in this field using the "ADD" button.
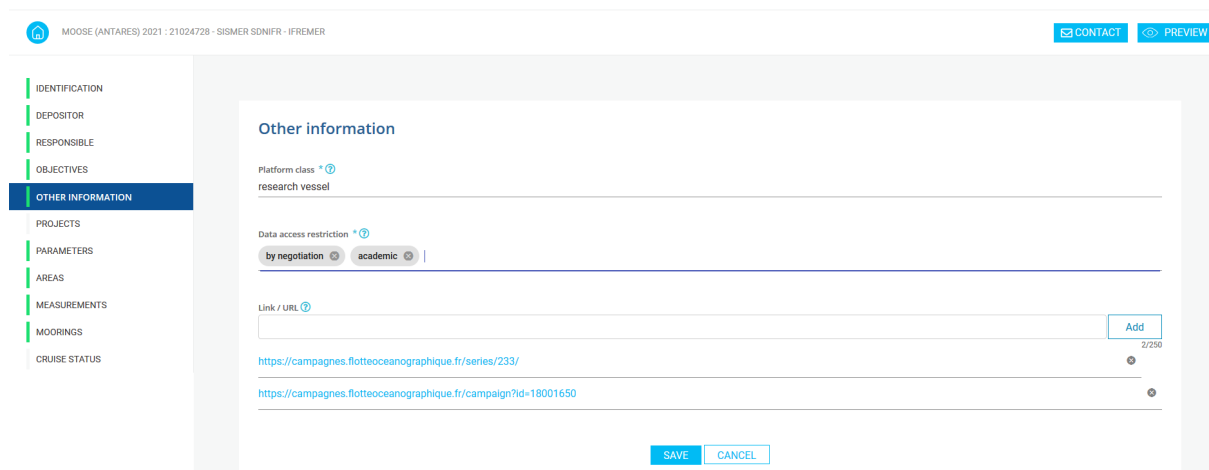

Figure 21 : Other information

2.4.1.6. Projects

This form allows to include information about the projects related to the cruise. These projects should be referenced in the EDMERP catalogue.
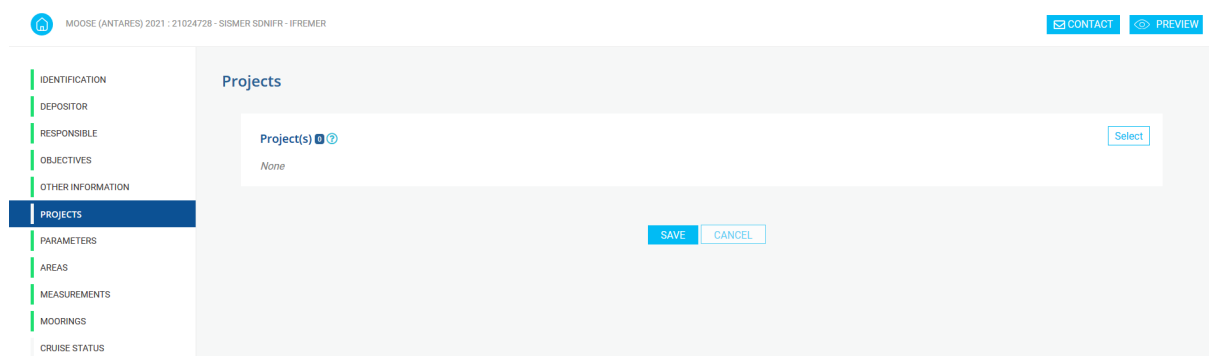

Figure 22 : Projects related to the cruise

1- Search the desired project (by typing their names or their EDMERP codes)

2- Select them by clicking on the "Select button"

3- You can select as many projects as you need.

If the desired project is not included in the EDMERP catalogue, please contact sdn-userdesk@seadatanet.org.

2.4.1.7. **Parameters/Instruments**

This form allows to include information about the parameters (P02 vocabulary list) measured during the cruise and the instruments (L05 vocabulary list) used for these measurements. You can select as many parameters and instruments as you need.
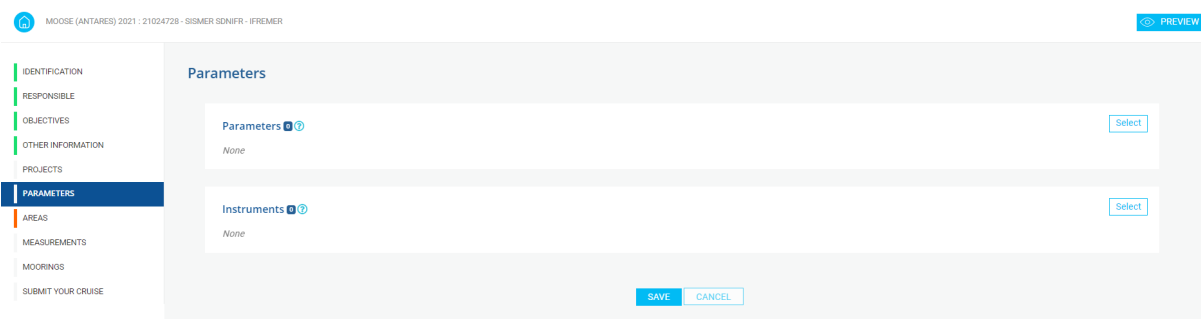

Figure 23 : Parameters and instruments

1- Search the desired parameter/instrument (using label or code)

2- Select them by clicking on the "Select button"

3- You can select as many parameters and instruments as you need.

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2.4.1.8. Areas

This form allows to include information about the geographic coverage of the cruise.

2.4.1.8.1. Ports of departure and return

The "Port of departure" and "Port of return" fields make reference to the C38 vocabulary list.

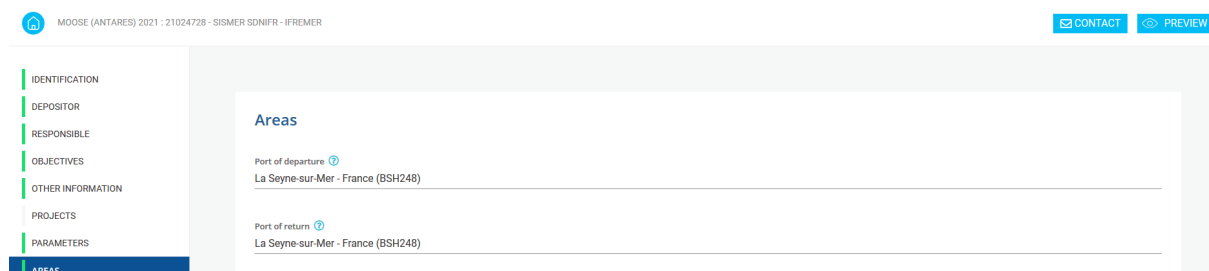You can search the desired port using its name or its C38 code.

Figure 24 : Ports of departure and return

If the desired port is not included in the C38 vocabulary list, please contact sdn-userdesk@seadatanet.org.

2.4.1.8.2. General ocean areas and specific areas

This part allows to include information about:

- General Ocean areas (C19 vocabulary list). You can include as many areas as you need.
  - by filtering directly in the dropdown list

  - by selecting areas using the tree of predefined areas

- Specific areas: free text describing the geographical areas. You can include as many specific areas as you need using the "ADD" button.

2.4.1.8.3. Marsden squares

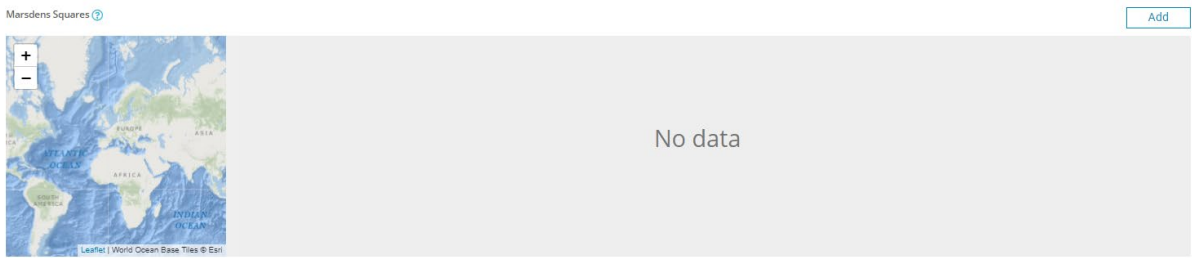The geographical coverage of the cruise can be described by one or more 10-degree Marsden Squares (C37 vocabulary list).
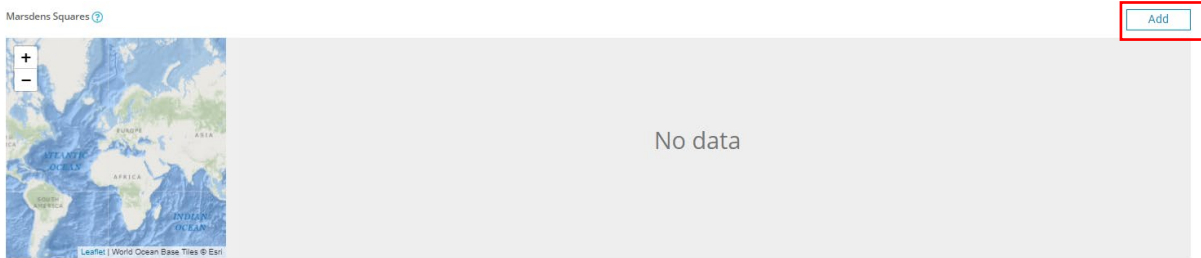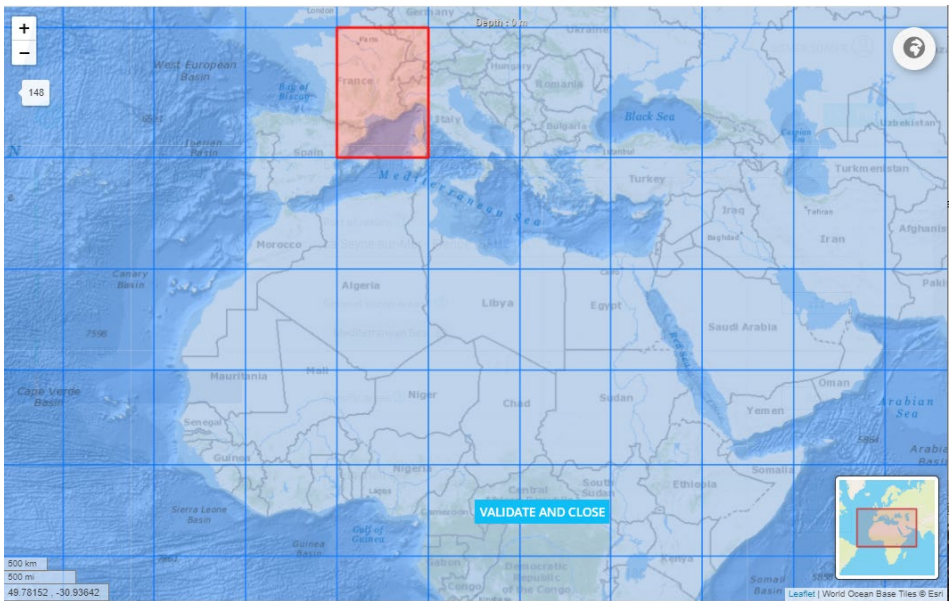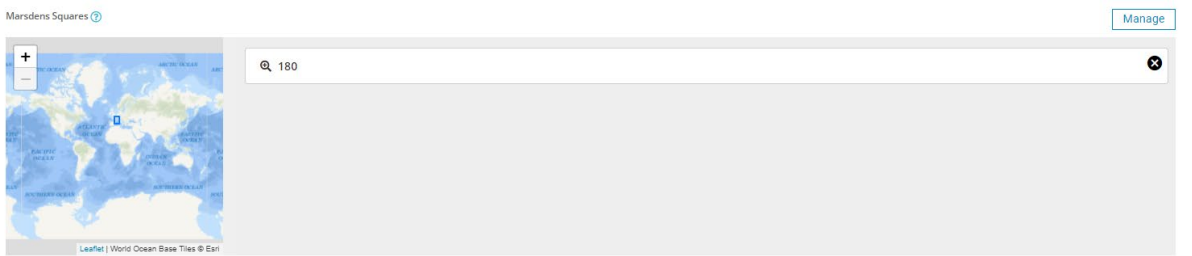
Figure 25 : Marsden squares

1- To select the Marsden squares, click on « Add » button

2- Select the Marsden squares by clicking on the map and then, click on "Validate and Close".

3- You can select as many Marsden Squares as you need

2.4.1.8.4. Bounding boxes

The geographical coverage of the cruise should be described by one or more bounding boxes.
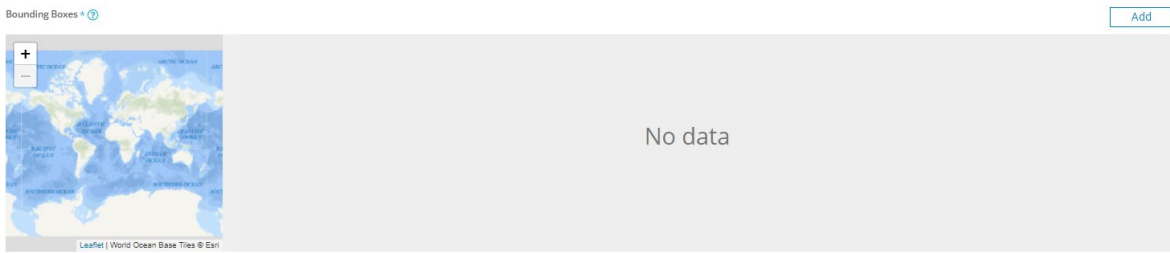
Figure 26 : Bounding boxes

1- To define these bounding boxes, click on « Add » button
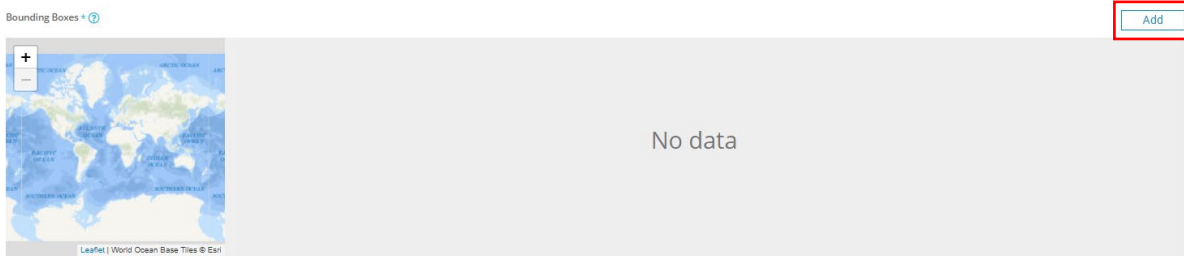
2- Two options are possible:

    a. draw the bounding box using the CTRL + mouse on the map
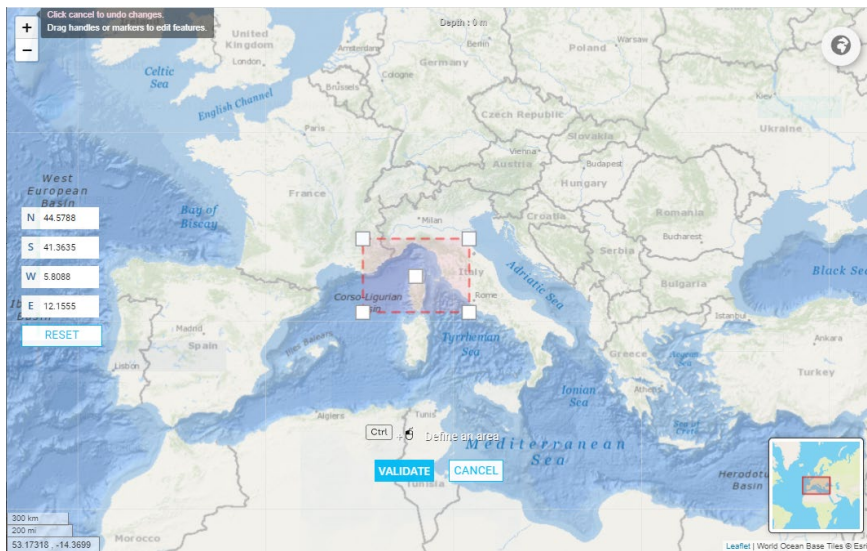
    b. enter the minimum and maximum latitude/longitude to define a bounding box.
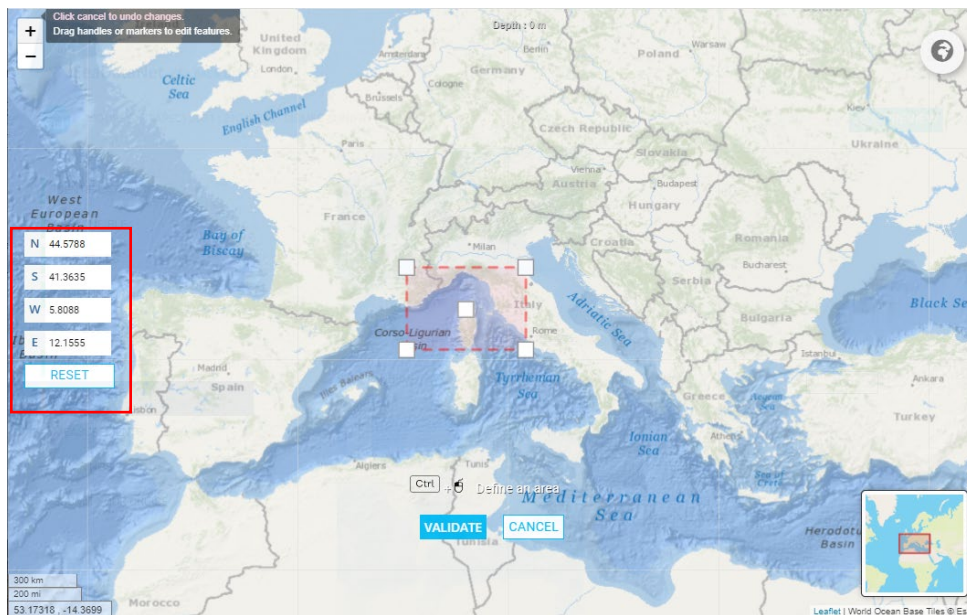
3- click "Validate" button
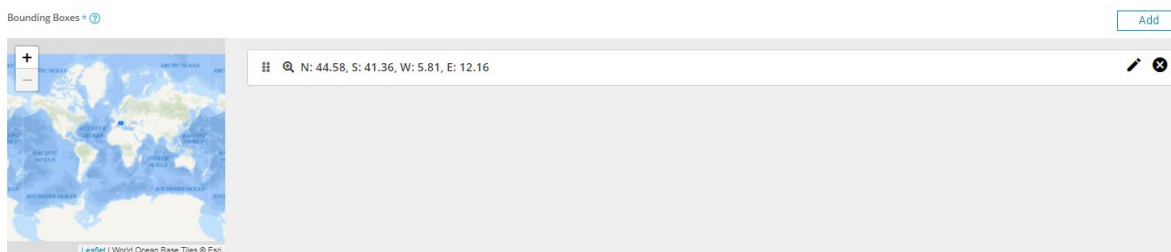
4- You can define as many bounding boxes as you need.

2.4.1.8.5. Track chart

In this section, you can upload the track chart of the cruise in GIF, PNG, JPEG or PDF format.

1- Click on ⬆ to upload your track chart

Upload your trackchart ❓

NB: Click to upload your trackchart

2- Select your track chart file
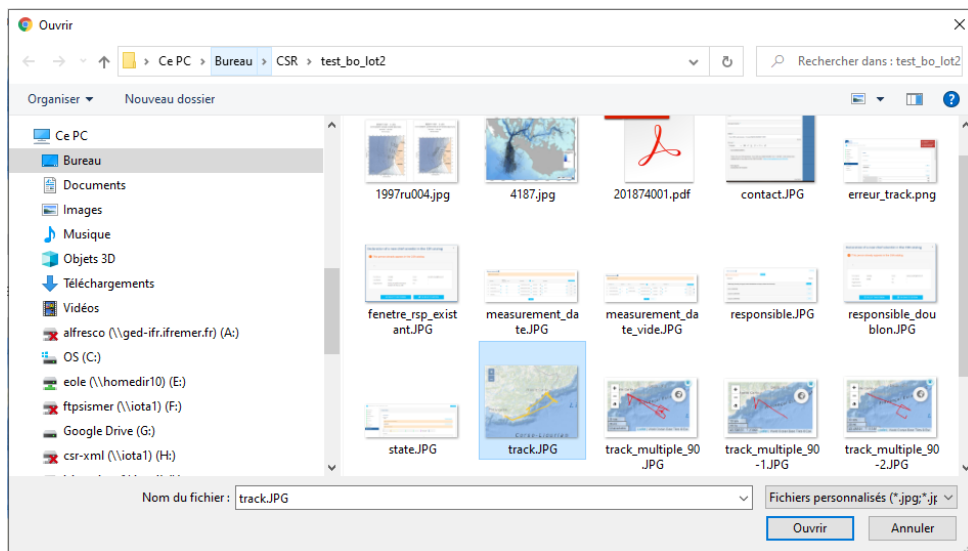
3- The track chart is uploaded and a thumbnail is created
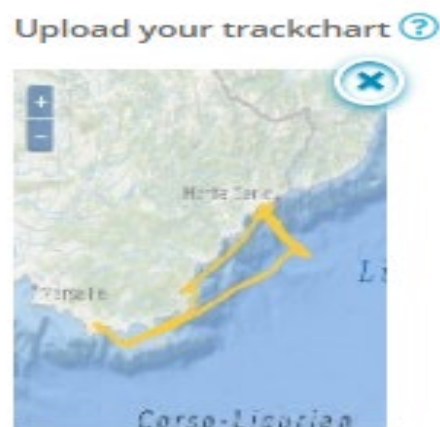
2.4.1.8.6. Track (ship route)

In this section, you can upload the track (ship route) of the cruise stored in a txt or csv file.

1- Create a txt or csv file following the provided template (click on "Download an example file"):

- the header is mandatory,

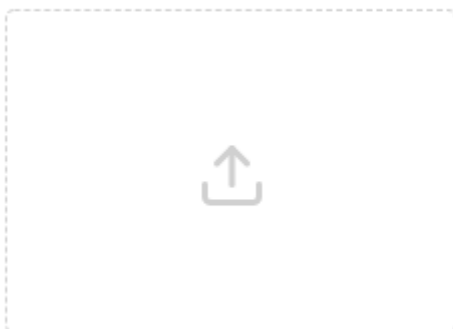- the first column (mandatory) includes the latitude,

- the second column (mandatory) includes the longitude,

- the third column (optional) can be used to include several tracks or curves. In that case, the different tracks should be numbered using an order number.

- the latitudes/longitudes should be arranged chronologically.

- for the sake of performance, the ship route should be sampled as much as possible.

```
LAT;LON;ORDER
43.6942;7.2838;1
43.6862;7.291;1
43.6117;7.3102;1
43.6102;7.3055;1
43.652;7.3018;1
43.6513;7.2977;1
43.611;7.3083;1
43.611;7.3042;1
43.6448;7.3002;1
43.6445;7.2957;1
43.5285;7.3268;1
```

2- Click on ⬆ to upload your file
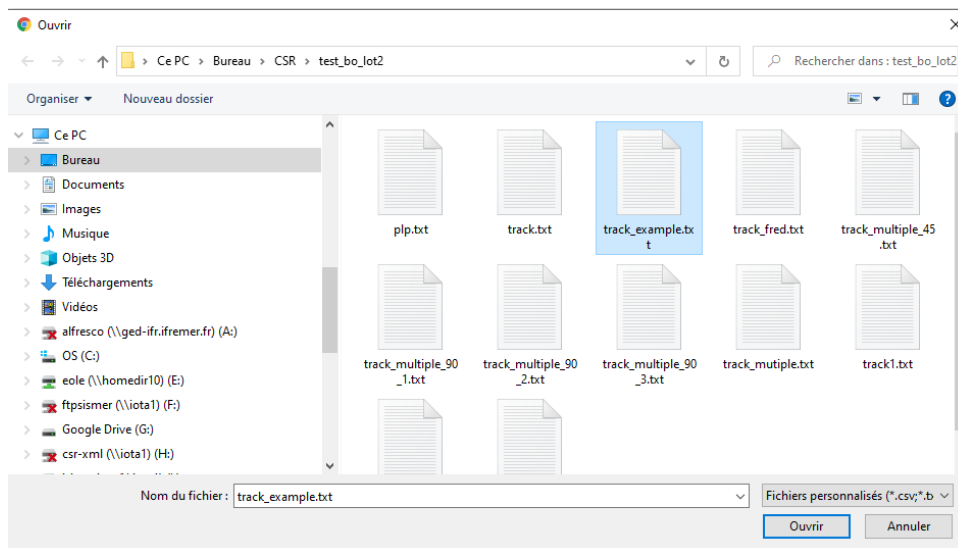
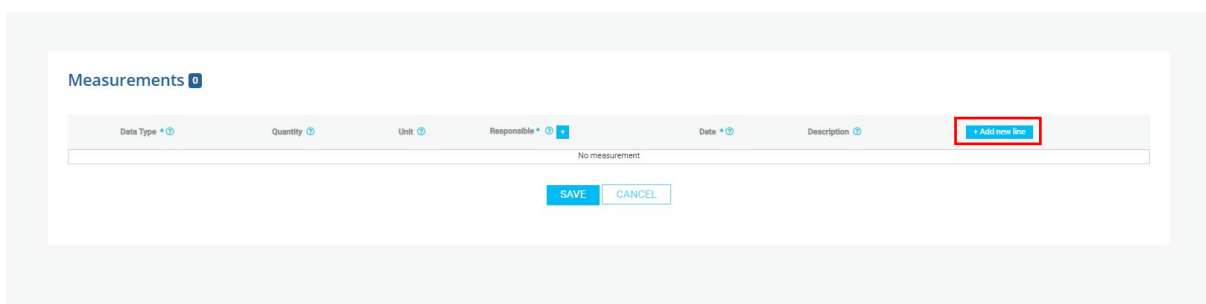3- The ship route is displayed and is now included to your CSR entry
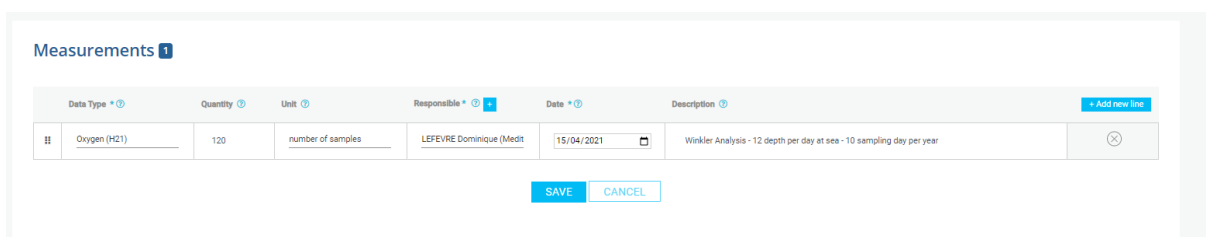
2.4.1.9. **Measurements/Moorings**

In your CSR entry, you can include information about measurements/moorings done during the cruise. The Measurement and Mooring forms are presented in the form of a table which enables to input the information about one or several measurements and moorings.

1- To add a line in the table, click on "ADD NEW LINE" button. You can add as many lines as you need. It is recommended not to include several lines for the same data types, prefer to fill in only a row with all the measurements for each data type. Exemple: include only one row "H10" for all the CTD measurements of the cruise, including the total number of stations in the Quantity/Units fields.
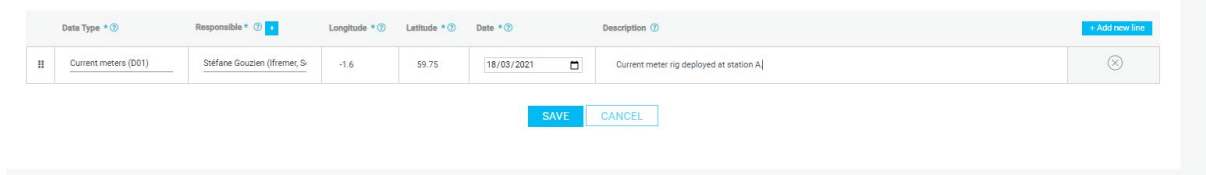
2- Complete the different fields for each line of measurements and moorings

3- You should include the name of the principal investigator of the measurement or mooring. By default, the list of responsible persons displayed in the table includes only chief scientists defined in the "Responsible party" form. If you need to add another principal Investigators, please use [+] button

4- A new window will open and allow you to select or create other responsible persons (this windows is similar to the window used for the selection of chief scientist – see 2.4.1.3.1)

5- You should include a date for each line of measurements and moorings. In this field, you can include the start date of the measurements or the start date of the cruise.

6- The measurements and moorings tables allow to duplicate information from one row to the next row using the arrow icons

- light blue arrow icon allows to duplicate only the current field to the next row

- dark blue arrow icon allows to duplicate all the fields of the current row to the next row

1- The measurements and moorings tables allow to order the different rows. To do so, click on the ⠿ button and drag and drop the rows as you want.

2.4.1.10. **Preview**

At any time during the input, a preview of the CSR entry is possible by clicking on the "Preview" button.

Figure 27 : Preview

2.4.1.11. **Save your cruise**

During your CSR input, the forms are automatically saved when you switch from one form to another or when you quit the CSR application.

You have also the possibility to save your input using the "Save" button in each form or to cancel your input using the "Cancel" button.

Figure 28 : Save and cancel

2.4.1.12. **Submit your cruise**

Once all the forms have been completed, you could submit your cruise.
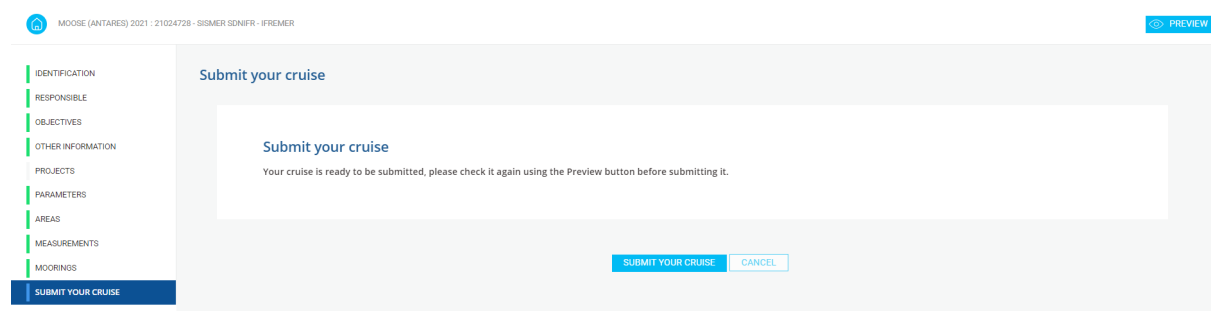
Figure 29 : Submit your cruise

After submitting your cruise, the status of the CSR entry becomes "Waitingforvalidation". The administrator will be notified by email that a CSR entry has been submitted. No change is possible until the validation by the administrator (except deletion).

2.4.2. **Update of an existing CSR entry**

As long as the CSR entry has not been submitted (status Draft, UpdateInProgress), it is possible to edit and update it using the online forms by clicking on the name of cruise.

Once a CSR entry has been submitted (status WaitingForValidation and WaitinfForValidation AfterAnUpdate), it is no more possible to edit and update it until the validation by the administrator.

Once a CSR entry has been validated, it is possible to update it using the online forms but the process is slightly different:

1- click on the ✎ button as shown in the figure below:

Figure 30 : Update an existing CSR entry

2- Confirm that you want to update the CSR entry

Update cruise

Are you sure you want to update the cruise **"MOOSE (ANTARES) 2021"** (id: 21024728) ?

CANCEL   CONFIRM

3- You will be redirected to the online forms and you will be able to update the CSR entry.

Note that at this stage, a new version of the CSR entry has been created and its status is "UpdateInProgress". The "Validated" version is still available on the CSR back-office until the submission and validation of the update.

4- After updating the information, you should submit again the cruise in "Submit your cruise" form. The status of the CSR entry becomes "WaitingforvalidationafteranUpdate" until the validation by the administrator.

2.4.3. Duplication of an existing CSR entry

To go faster in creating a new CSR entry, it is possible to duplicate an existing CSR entry.

Note that only "Validated" CSR entries can be duplicated.

1- To do so, click on the ⧉ button as shown in the figure below:

Figure 31 : Duplication of an existing CSR entry

2- Confirm that you want to duplicate the cruise.

Duplicate cruise

Are you sure you want to duplicate the cruise **"MOOSE (ANTARES) 2021"** (id: 21024728) ?

CANCEL	CONFIRM

3- A new draft has been created and can be updated to create the new CSR entry. To access the online forms, click on the name of the new Draft.

⚠	Status	Name	Country	Chief scientist	Platform	Period	Revision Date ⌄	Depositor			
	Draft	MOOSE (ANTARES) 2021 - DUPLICATED 21024773	France	Didry Morgane, ...	Tethys II	15.04.2021 ▷ 03.12.2021	23.03.2022	SISMER SDNIFR	🗑	▣	✎
	Validated	MOOSE (ANTARES) 2021 21024728	France	Didry Morgane, ...	Tethys II	15.04.2021 ▷ 03.12.2021	18.03.2022	SISMER SDNIFR	🗑	▣	✎

All the fields are pre-filled with the same information as the cruise which has been duplicated.

Note that :

- some fields had to be modified by the CSR back-office to allow duplication: name of the cruise and cruise local ID include a "DUPLICATED" suffix.

Identification

ⓘ Same ship, same dates but with a different cruise name than existing cruises : MOOSE (ANTARES) 2021 (state: validated)

Name of the cruise * ⓘ
MOOSE (ANTARES) 2021 - DUPLICATED
33/160

Collate centre * ⓘ
Ifremer, Scientific Information Systems for the sea (486)

Cruise DOI ⓘ
https://doi.org/10.17600/18001650
33/250

Cruise local id ⓘ
18001650-DUPLICATED
19/80

Alternative name ⓘ
FI352021165000
14/80

Ship/Plaform * ⓘ
Tethys II (35TT)

- A warning will appear because the new CSR entry has been identified as duplicate. This warning will disappear if the ship name and/or the begin and end dates are updated.

Identification

> ❶ Same ship, same dates but with a different cruise name than existing cruises : MOOSE (ANTARES) 2021 (state: validated)

Name of the cruise * ⑦

MOOSE (ANTARES) 2021 - DUPLICATED

33/160

Collate centre * ⑦

Ifremer, Scientific Information Systems for the sea (486)

Cruise DOI ⑦

https://doi.org/10.17600/18001650

33/250

Cruise local id ⑦

18001650-DUPLICATED

19/80

Alternative name ⑦

FI352021165000

14/80

Ship/Plaform * ⑦

Tethys II (35TT)

4- Update the desired fields and submit the CSR entry using the "Submit your cruise" form.

2.5. Workflow after CSR submission

2.5.1. Notification

You will not receive notification by email when submitting CSR entries using the CSR back-office. But you will be able to check the list of your CSR entries which have been submitted and are waiting for validation by the administrator :

- status = Waiting for validation for a new CSR entry,
- status = Waiting for Validation after an update for an updated CSR.

To display only these status, use the "State" filter, as shown on Figure 32.

Figure 32 : Display only "Waiting for validation" and "Waiting for validation after an update" CSR entries

You will receive a notification by email when your submission will be validated or rejected.

2.5.2. Status

The different possible status for a CSR entry are:

- **Draft:** new CSR entry in progress, created using the CSR online forms, not yet submitted

- **Waiting for validation**: new CSR entry submitted and waiting for validation by the administration (IFREMER)

- **UpdateinProgress:** update in progress of an existing CSR entry using the CSR online forms, not yet submitted

- **Validated**: CSR entry has been validated by the administrator and appears on the CSR front-office

- **Waiting for validation after an update**: an existing CSR entry has been updated and the update is waiting for validation by the administration (IFREMER)

- **Rejected**: the submitted entry (new or update) has been rejected

- **Deprecated**: the CSR entry has already been online on the CSR front-office and has been deprecated instead of deleted.
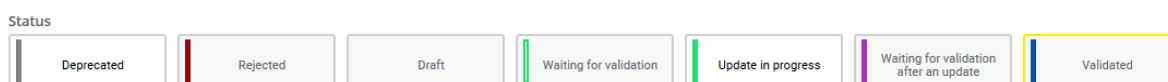

Figure 33 : Different CSR status

You can check the status of your CSR entries on the homepage of the CSR back-office.

Figure 34 : Status of your CSR entries

2.5.3. Deletion of CSR entries

Only the CSR entries with the following status can be deleted by an user:

- Draft

- Rejected

- Waiting for validation

- Update in progress

- Waiting for validation after an update.

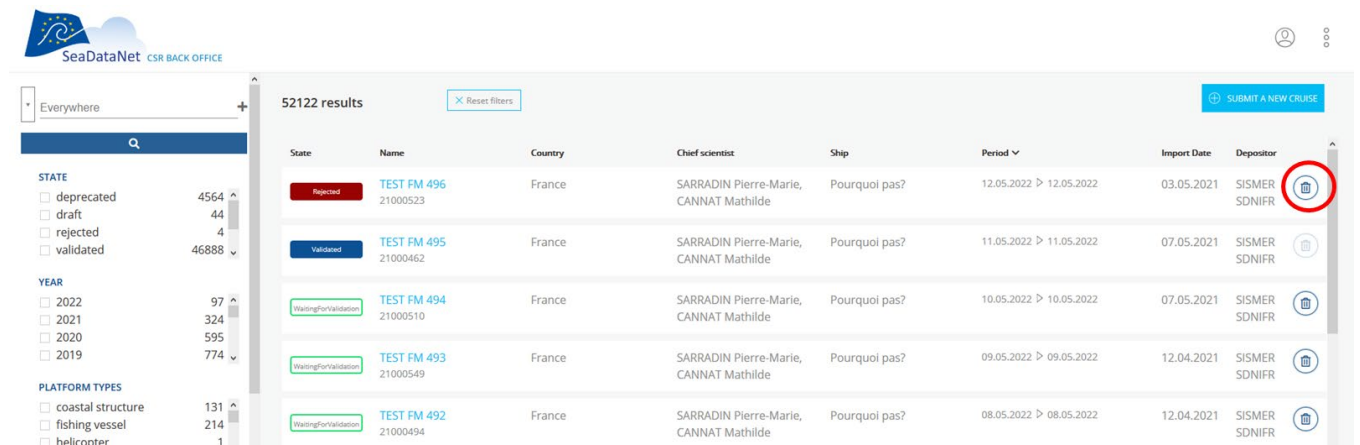To delete a CSR entry, use the "Trash" icon, as shown in Figure 35.

Figure 35 : Deletion of a CSR entry
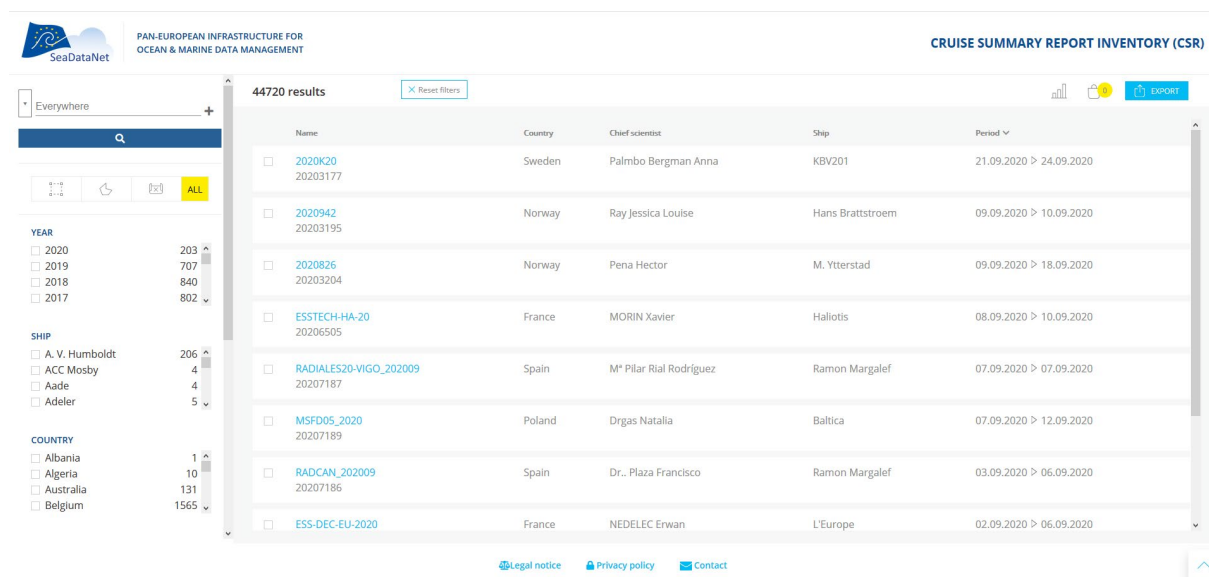
2.6. SeaDataNet controlled vocabularies

The CSR Back-office uses the following SeaDataNet controlled vocabularies (http://seadatanet.maris2.nl/v_bodc_vocab_v2/welcome.asp):

List code	List Name
C19	SeaVoX salt and fresh water body gazetteer
C77	ICES ROSCOP data types
C17	SeaDataNet CSR ship metadata
C32	ISO countries
C37	Ten-degree Marsden Squares
C38	Ports Gazetteer
L05	SeaDataNet device categories
L06	SeaDataNet Platform Classes
L08	SeaDataNet Data Access Restriction Policies
L18	ROSCOP sample quantification units
P02	BODC Parameter Discovery Vocabulary
EDMO	European marine organisations
EDMERP	European marine projects

The vocabulary lists used by the CSR back-office are updated **every night**.

3. Publication on the CSR front office

When your CSR entries are "Validated", they will appear automatically on the CSR front office at https://csr.seadatanet.org.

Figure 36 : CSR front office

4. Reference to a CSR entry in CDI

The day after the publication of a CSR entry, it will be possible to include references to this new CSR entry in CDIs entries using the MIKADO software.

If, after a successful vocabulary update, you did not find your CSR entry in the MIKADO CSR list, please check that you find it:

- in the CSR front office: https://csr.seadatanet.org

- in the following csrCodeList.xml file which is used by MIKADO to update the MIKADO CSR list (copy this file in local): http://csr.seadatanet.org/isoCodelists/csrCodeList.xml

If your CSR does not appear in the CSR front office or in the csrCodeList.xml file, please contact SeaDataNet Userdesk.

5. Reference to a CSR entry in your data files

If you make use of the sdn-reference tag in your data files to link them to a CSR entry, you will have to use the new CSR URLs:

- https://csr.seadatanet.org/report/[CSR central ID]/xml

- https://csr.seadatanet.org/report/edmo/[EDMO collate centre]/[CSR local id]/xml

It will be necessary to update the configuration files of your NEMO and Octopus software in consequence. To do so, please contact sdn-userdesk@seadatanet.org.