HOW TO SUBMIT YOUR RESEARCH PLAN AND SAMPLE AND/OR DATA REQUEST

Although most of you will have no trouble submitting your request without guidance, here are step-by-step instructions for your reference.

A. GETTING READY

- Research description and sample list: The essence of a request usually consists of two items, a research plan description and a generic sample list. You can prepare the short (<2000 characters) description of your proposed research prior to logging in to the Sample and Data Request (SaDR) system and then paste it in. The generic sample list, however, requires that you download the Sample Template from the SaDR website once you logged in and are on the "Attach Files" tab, fill it out, and attach it before submitting the request. Please identify the site(s) as listed in the Scientific Prospectus.
- User registration: Go to the home page http://web.iodp.tamu.edu/sdrm/
- Select “Request an Account” and fill in the required information. This registration step is only required once. If you request more material from IODP in the future, you will use the same username and password.
- Login: Once you are registered, select “Login as Requester” from the home page and enter your login ID and password to access the system. Should you forget your password, SaDR allows you to reset it.
- After you login, you can either “Start new request” (first tab in top row), or edit an existing draft request from the Current Activity list.
- Shipping information: If you are starting a new request, go to "Shipping Addresses" (second tab in top row) to enter your work and shipping address. You MUST enter an address in order to submit a sample/data request. If your work address and shipping address are the same, you need only enter one address. If your shipping address is different please check the appropriate box (“Default Work” or “Default Shipping”) when entering the addresses. Please note, we do not typically ship to residential addresses.

B. PREPARING/EDITING THE REQUEST

1: Sample Request

Whether you are starting a new request or editing an existing draft, you will start with the first tab in the second row, “1: Sample Request”. If this option is not available on the menu across the top of the page, you need to enter a shipping address!

- Descriptive Title (optional): You may enter an optional title for your request.
- Request Type: Make a selection (usually research).

- Select future or past expeditions(s): For our purposes, check “Future and Moratorium” check box, which displays a list of scheduled expeditions. Select The expedition you will be sailing on. Be sure to check “ship based” (majority) or “shore based” (for requesters who are not sailing with us).
- Summary of project: Paste or type your research plan or project summary (<2000 characters) in the upper right panel. You will be given the opportunity to upload/attach a file with additional information in the next tab.
- Co-investigators role: Include the names of all scientists who will collaborate with you on your proposed project and clearly describe their role. You will need to enter their contact information in a later tab. If some of the work will be carried out by an as-yet unknown graduate student or post-doctoral researcher, just indicate “graduate student” or “post-doc” and list the role that the person is expected to fill.
- Are you requesting: Select the sample types that you are requesting.
- Are you requesting shipboard data: Check all that apply.
- Data types produced: Check all data types that will be produced as a result of your request. If something is not listed, you have the option of entering it in the “Other” field.
- Save/Update Entries: Click the orange “Save/Update Entries” button. You can save at any time in the process, but you must save before proceeding to the next tab. Once you click “Save” for the first time, a request number will automatically be assigned to your request and the remaining tabs will now be accessible for you to continue. Once you have clicked “Save/Update Entries”, you will be able to access the sample request during a later session if you are unable to finish it.

2: Attach Files

- Click the “2: Attach File” tab to continue. You may upload any files you want to attach on this screen. Choose a file and give it a descriptive name if you want, and then click the orange “Attach” button. Once you have uploaded a file, you may view or delete it from the “Attach File” tab.
- You also may download the *Sample Template* (click on “Future sample template” underneath the Excel icon) from this page. Please note that we are after general information at this stage: site(s), age or approximate depth intervals or rock types, sampling interval, sample volume, etc. You don't need to fill out fields that do not apply to your request (e.g., you can give either age or depth intervals but you don't necessarily need to do both).
- After you have filled out the *Sample Template*, upload it as a file on this page following the instructions above. The Sample Allocation Committee (SAC) will use this information to estimate the number of samples for each request, identify potential conflicts, etc.

3: Shipping address

- Click on the “3: Shipping address” tab to continue. Enter the address where you wish your samples to be shipped. You can select any address you already stored in the system (click on “Load my work address” or “Load my shipping address”) or enter a new one.
- After you have entered the address information, click the orange “Add/Update this address” button – it will appear at the bottom of the page where you can check it to ensure it is correct. If you need to fix any part of it or want to delete it, click on “Edit this entry” or “delete”.
- You may enter more than one shipping address. In the comment box, indicate which samples go to which address.
- Use the comment box to indicate any special required sampling techniques, tools, chemicals, shipping conditions, etc. needed for your request. You may also upload any special handling or shipping requirements as a file (“Attach file” tab), giving it the description “special handling” when you upload it.

4: Co-requesters

- Click on the “4: Co-requesters” tab to continue. Enter the name, email address, and affiliation (optional) for each person who will work on samples/data from your request. Once you’ve entered the requested information, click “Add/Update Co-requester”. The information will appear below, at which point you can edit or delete the entered information.

C. SUBMITTING THE REQUEST

5: Review and submit

- **NOTE:** Once the request is submitted you will not be able to edit it unless the Curator releases it back to you. If you need to edit a submitted request, please contact the Gulf Coast Repository (curator@iodp.tamu.edu).
- Click the “5: Review and submit” tab to continue. A summary of your sample request will appear and you may download a PDF version using the link (“View as PDF) at the top of the screen.
- If anything needs to be edited, you may return to any tab and change information, add or remove attachments, etc.
- If you are satisfied with your request, click “Submit this request.”
- Once a request is submitted you may download a ZIP file with the request and all attachments, and you and your co-requestors will also receive an email with your sample request number. The IODP curatorial staff and EPM will review your request for quality control and if any pertinent information is missing we will return the request to you for completion and later you can resubmit the completed request.

Thank you again for your participation. We look forward to working with all of you.