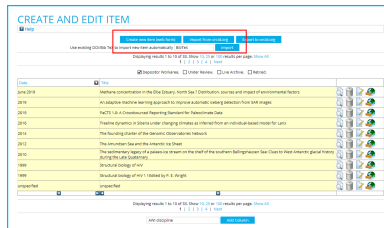


EPIC

Best Practices



The screenshot shows the 'CREATE AND EDIT ITEM' form. At the top, there are tabs for 'Deposit', 'Edit', and 'View'. The 'Deposit' tab is selected. Below the tabs, there is a table with columns for 'Title', 'Author', 'Year', 'DOI', 'Status', and 'Actions'. The 'Deposit' button is highlighted with a red box.

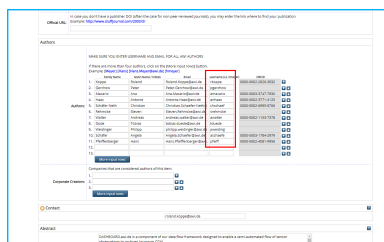
Create items

Items can be created by:

(1) manually editing EPIC's submission form: this option is ideal for items which have not been published yet (e.g. an article in press) or do not have a DOI (e.g. talks, posters, field reports). In case you have entered an article which has not been published yet, you should keep it in your "User Workarea" until the article has a DOI and thus ready for revision by editors (use the "Save for later" option instead of "Deposit"; see "Understanding the Workflow" below).

(2) importing from resolvable DOIs: this option is ideal for articles for which an official DOI is available as it automatically imports all the existing bibliographic metadata as available directly from CrossRef. In this case users will only have to additionally enter the AWI-specific metadata (e.g. username/email for AWI authors, research platforms, grant ID, etc).

(3) importing from BibTex: this option is ideal for items which are already in a BibTex formatted reference document.



The screenshot shows the 'CREATE AND EDIT ITEM' form. At the top, there are tabs for 'Deposit', 'Edit', and 'View'. The 'Deposit' tab is selected. Below the tabs, there is a table with columns for 'Title', 'Author', 'Year', 'DOI', 'Status', and 'Actions'. The 'Deposit' button is highlighted with a red box.

Submit items for revision

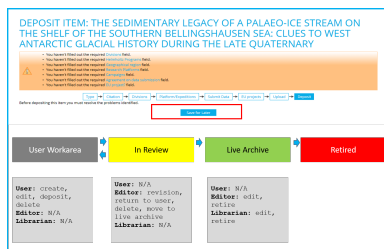
Items created in EPIC are automatically stored in the "User Workarea" when the option "Save for later" is selected. In the context of Helmholtz revision process, it is particular important that the following metadata fields for all articles, theses, books and chapters in books, are correctly entered:

(1) official DOI for articles: the DOI allow us to automatically tag your item to a PANGAEA dataset, if applied. The official DOIs are also used to find out the impact of your articles in various social media along with citation information as provided by the alternative metrics "Altmetrics" badge in the landing pages.

(2) authors: all AWI authors must be assigned AWI email, username and ORCID (if available). Use the auto-completion functionality to avoid typos. Only items for which the AWI username is available and in "Live archive" will be found in AWI personal homepages.

(3) divisions/work packages: the organizational units of all AWI authors must be entered accordingly. Items which do not align with Helmholtz research must be tagged with "Helmholtz Independent research" option.

(4) platforms/campaigns: research platforms operated by AWI (and respective campaigns) used to acquire the data used in publications, presentations, thesis and field reports must be tagged accordingly. This enables the assignment of EPIC items to expeditions/campaigns in the framework of the [DATA](#) portal (see "Re-using the metadata" below)



The screenshot shows the 'DEPOSIT ITEM' form. At the top, there are tabs for 'Deposit', 'Edit', and 'View'. The 'Deposit' tab is selected. Below the tabs, there is a table with columns for 'Title', 'Author', 'Year', 'DOI', 'Status', and 'Actions'. The 'Deposit' button is highlighted with a red box.

Understand the workflow

Users are only allowed to edit items in their own "User Workspace". Once the metadata is complete and the PDF has been uploaded, users may click on the "Deposit" option. This will automatically move the item you created from workflow status "User Workarea" to "Under review" and an email notification is then sent to editors. Items will then be reviewed by editors for metadata correctness and placed in "Live archive" as soon as possible. Once in live archive, items are then automatically displayed in AWI personal homepages and an individual persistent unique identifier is created (type handle; example: [hdl:10013/epic.8a437225-08fc-4e53-99e3-cd67dbfe1424](https://doi.org/10.1013/epic.8a437225-08fc-4e53-99e3-cd67dbfe1424)). Once in "Live archive", items of type article, book, chapter in book and theses, relevant for the Helmholtz metrics, will be bibliographically revised by librarians.

Please note that items in "Live archive" can only be edited by the respective division/section editors (see [internal list](#)) or librarians (request to pub-bib at awi.de). Only items in "Live Archive" are displayed in AWI personal homepages.

Items in "Live archive" have a handle and thus should not be deleted. However, in exceptional cases in which an item should no longer be shown, it can be hidden from the public by placing it under status "Retired". Email to epic@awi.de or pub-bib@awi.de should be sent in case you need to hide an item.

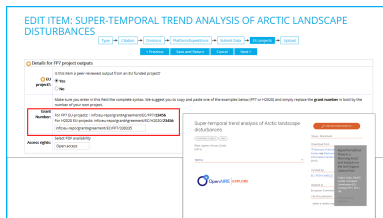
Archive and cite data



Following the [Guidelines for Safeguarding Good Scientific Practices](#), you are advised to archive all data related to publications in a certified and cite-enabled repository. For AWI data, in particular for the data acquired using AWI research platforms, the recommended information system is [PANGAEA](#) which is a [CoreTrustSeal](#) certified repository. We strongly advise you to submit your data using <https://pangaea.de/submit/> as soon as possible so that you can exemplarily insert the dataset DOI in the article's reference list in time.

Data archival in PANGAEA follows the [FAIR Guiding Principles for scientific data management and stewardship](#). The extensive curatorial and editorial services often require processing times ranging from several days to several weeks, depending on the data volume and complexity. To prevent data to be publicly available before the related manuscript is published, PANGAEA offers the "in review" dataset status which supports, upon demand, the provision of an access token for the data peer-revision process. PANGAEA additionally provides password protection for datasets under moratorium if wished (for ongoing projects, as example).

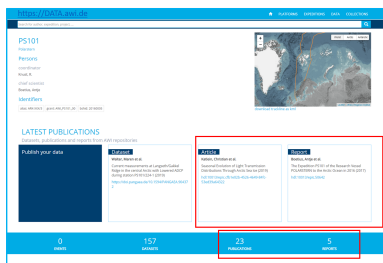
As depicted in the example, datasets archived in PANGAEA will be automatically shown using a PANGAEA icon in EPIC landing/abstract pages for all articles in which an official DOI has been provided as "Supplement" for a dataset archived in PANGAEA.



Link publication to EU grant numbers

EPIC enables tagging to an EU grant number (FB7 and H2020). Make sure you exactly follow the syntax rules as displayed in the help text. By tagging your items to the corresponding EU grant, you are supporting openAIRE to create statistics of various funding agencies and projects.

The grant number is automatically displayed in the individual landing page of articles, if provided. Example:



Type once, re-use often

EPIC supports the export of the metadata associated with an individual item as well as the listing of items resulting in a given search criteria (e.g. all [ISI articles](#) from A. Boetius). Items can be exported in various formats individually or by making a bulk export using the advanced search interface.

The metadata in EPIC is also being used in the framework of the AWI DATA portal. In this case EPIC's metadata is being harvested on a daily basis and displayed in the context of expedition /campaigns and in the faceted search. Examples are:

- Articles and field reports for [PS101](#)
- [Articles from Neumayer III](#) related to Helmholtz PACE research program WP 1.1
- Publications and reports (EPIC) and datasets (PANGAEA) from author with ORCID 0000-0003-2117-4176 (A. Boetius) for expedition [PS101](#)

EPIC can also be used to archive key resources related to devices and sensors described in <https://sensor.awi.de> (e.g. data processing reports, calibration documents, factsheets; use type "Miscellaneous").