1. SDRM overview

- Purpose
- Types of request
- Expedition phases
- Request status
- XRF Scanning

Purpose

The IODP sample, data and research request manager (SDRM) is a website designed to collect and manage requests to use IODP core samples and data for scientific research, and education and outreach objectives. All requests will be reviewed by an IODP curator and all those submitting requests must acknowledge the IODP Sample, Data and Obligation Policy (https://www.iodp.org/top-resources/program-documents/policies-and-guidelines/519-iodp-sample-data-and-obligations-policy-implementation-guidelines-may-2018-for-expeditions-starting-october-2018-and-later/file).

Pre-expedition research and sample planning: All invited participants on upcoming IODP expeditions and those interested in participating as shore based science party members, must submit a request a sample, data and research request in SDRM. Please contact the expedition project manager for more details regarding submission deadlines.

Moratorium sample and data requests: All requests for expedition samples and shipboard data for expeditions in the moratorium period must be submitted in SDRM. These requests will be reviewed by the expedition Sample Allocation Committee.

Post-moratorium sample requests: All requests for samples from post-moratorium or "past" expeditions must be submitted in SDRM. These requests will be reviewed by the IODP curator at the repository that houses the requested cores. Shipboard data for these expeditions are publicly available on IODP databases.

XRF scanning requests: The BCR, GCR and KCC all house scanning XRFs that can be used to generate semi-quantitative elemental data on cores. There is typically an hourly rate charged for using these instruments. Please contact the respective repository for more details on their facility.

Education and Outreach requests: IODP core material can be requested for education and outreach purposes. Examples of common uses, museum exhibits, classroom activities, or outreach events. Depending on the type and amount of material requested, these samples may be provided on a loan basis and need to be returned to the repository.

Types of request

Request Type	Description
Research	A request to conduct research on IODP samples and/or data.
Education and Outreach	A request to use IODP materials for educational and outreach objectives.

Expedition phases

Expedition Phase	Description
Future and Moratorium	An expedition has that been scheduled but has not sailed yet or is within the 1 year moratorium period following the end of the shore-based sampling party or 1 year from the end of expedition if all samples were collected on board. Requests require approval from the expedition Sample Allocation Committee.
Past	A completed expedition that is no longer under moratorium. Requests require approval from an IODP curator.

Request status

Request Status	Description
Draft	Request can be modified by the user. Has not been submitted for review by an IODP curator.
Submitted	Request is ready for review by and IODP curator.
Revise	Edits to the request are required.
Approved	Request is approved by an IODP curator.

Completed	Request is fulfilled.
Retired	Request is no longer relevant.
Rejected	Request is not approved.

XRF Scanning

The BCR, GCR and KCC all house scanning XRFs that can be used to generate semi-quantitative elemental data on the surface of split core sections. There is typically an hourly rate charged for using these instruments. Please contact the repository for more details about their scanning XRF facility.

BCR - https://www.marum.de/en/Infrastructure/XRF-Core-Scanner.html

GCR - https://iodp.tamu.edu/labs/xrf/

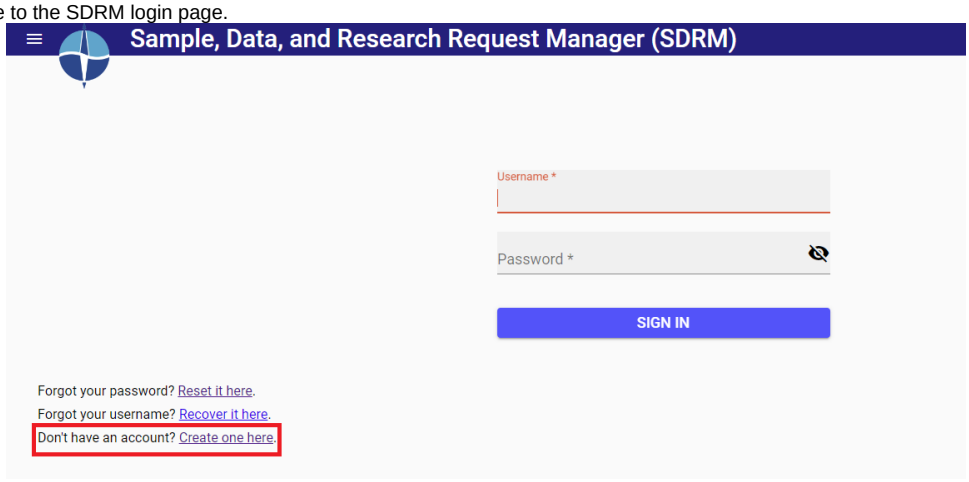
KCC - http://www.kochi-core.jp/en/facilities_and_equipment/corelogging.html#5

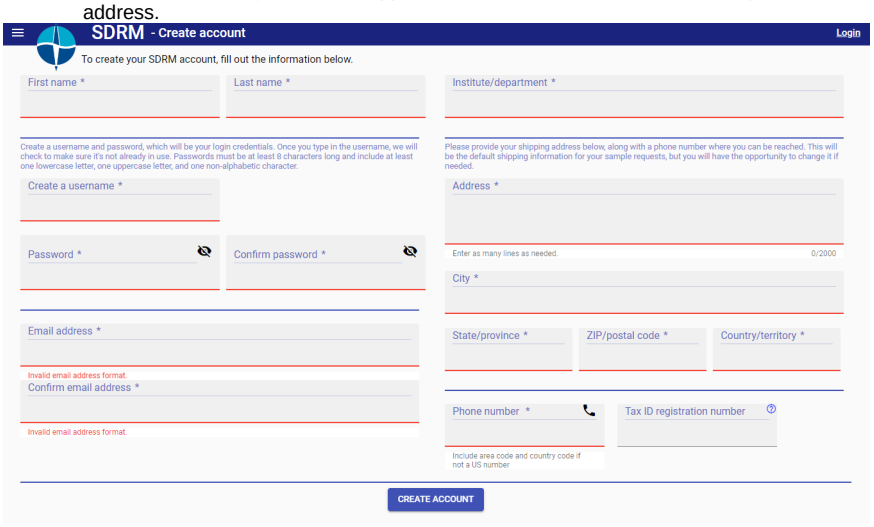
2. Login/Creating an account

- Create A New Account
- Forget Username?
- Forget Password?
- Inactive Account (no login within the past 6 months)

Prior to submitting a request on SDRM, all users must create an account. If you had an account on the previous version of the IODP sample request website, you will be able to log in using the same account credentials.

Create A New Account

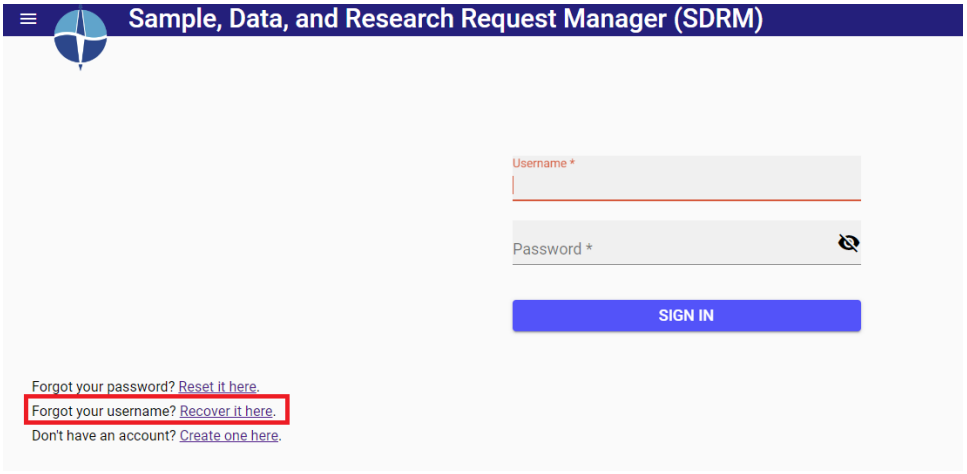
1. Navigate to the SDRM login page.
    a. 

    b. Select: Don't have an account? "Create one here"
2. Enter all required registration information.
    a. You will use your selected Username to log into the program.
    b. Passwords with less than 16 characters will expire after 1 year. Passwords with more than 16 characters will expire after 4 years.
    c. Email address, name, and shipping address can all be updated later, if your contact information changes.
    d. ***Accounts with email addresses with non-academic domains (i.e. gmail, yahoo, hotmail), will be vetted by an IODP curator before being able to log into SDRM.***
        i. There will be a delay in account approval because of this. Therefore, it is highly recommended that you use you academic email address.
    e. 

3. Click "Create Account".
4. Verify account Email address.
    a. Click link in automated email to verify email address.
5. Accounts with known academic or government email domains (i.e. .edu, .ac., .gov) can immediately log in and make a sample request.
6. *Accounts with email addresses with non-academic domains will receive an email once their account has been vetted and approved by an IODP curator.* After receiving this, you may log into SDRM.

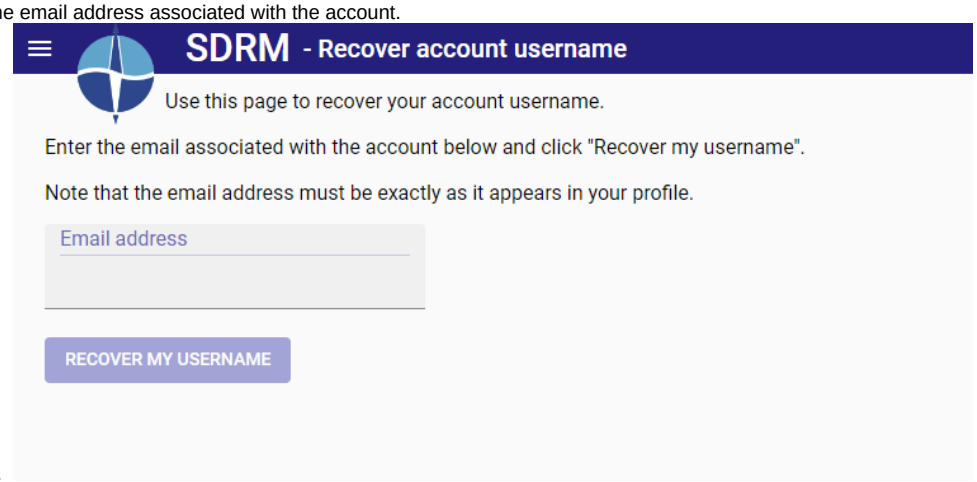
Forget Username?

1. Navigate to the SDRM login page.
    a. Select: Forget your username? "Recover it here"



b.

2. Enter the email address associated with the account.

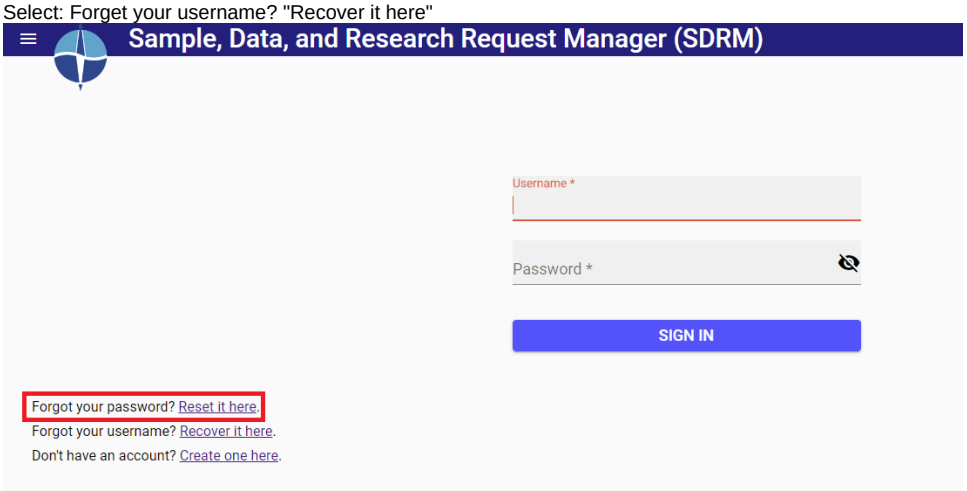


a.

3. Click "Recover my username"
4. If an account has the entered email address associated with it, you will receive an automated email with your username information.

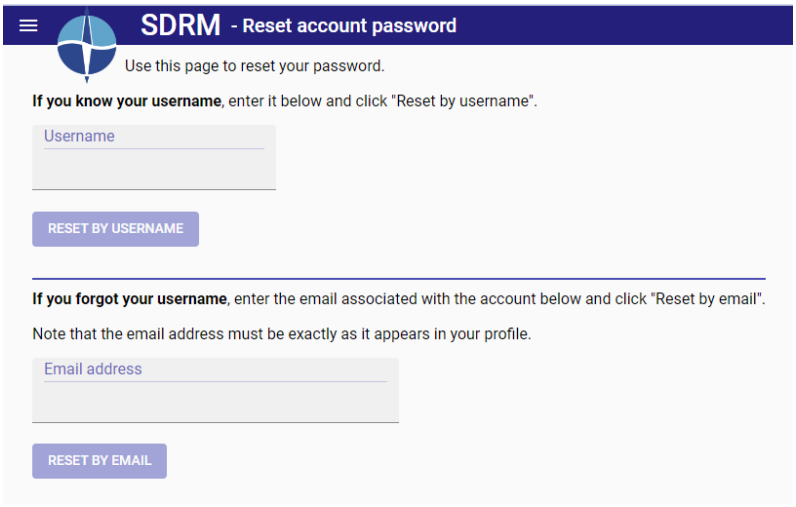
Forget Password?

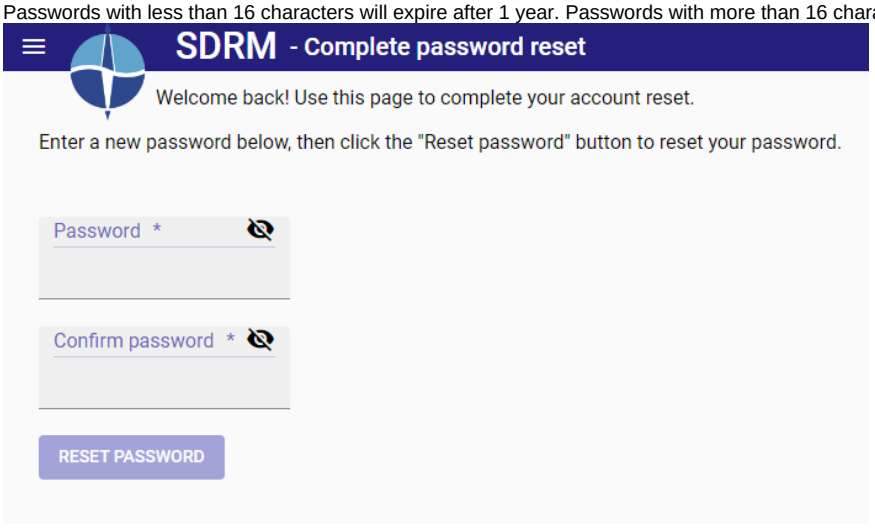
1. Navigate to the SDRM login page.
    a. Select: Forget your username? "Recover it here"



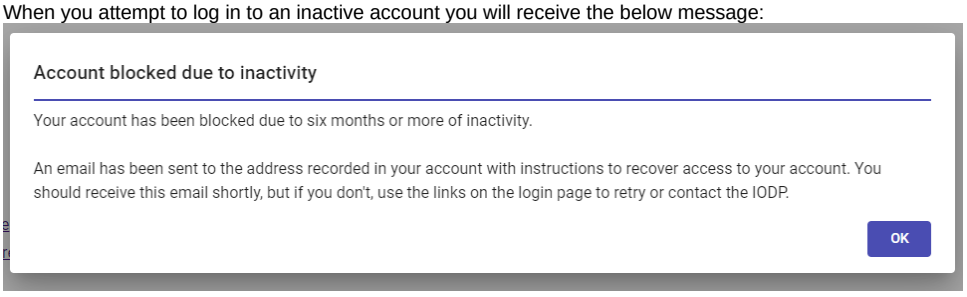
b.

2. Enter the username or email address associated with the account.

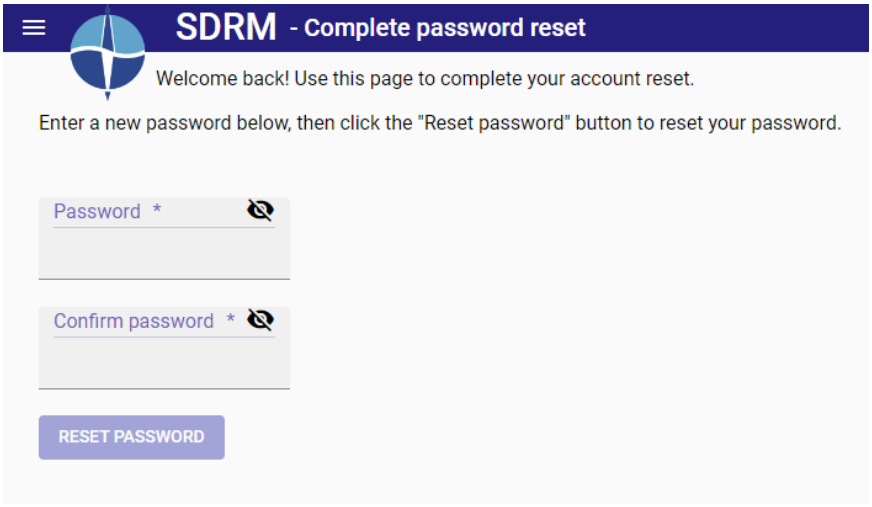
a. 

3. Click "Recover by username" or "Reset by email"
4. If an account has the entered username or email address associated with it, you will receive an automated email with a link to reset your password.
    a. The link to reset your password will expire 24 hours after it was sent.
5. Click on the link in the email to navigate to a page where you can update your password.
    a. Passwords with less than 16 characters will expire after 1 year. Passwords with more than 16 characters will expire after 4 years.
    b. 

Inactive Account (no login within the past 6 months)

1. If you do not log into your SDRM account for 6 months, your account will be automatically disabled.
    a. When you attempt to log in to an inactive account you will receive the below message:
    b. 

2. You will receive an automated email with a link to reset your password and reactivate your account.
    a. You must reset your password to reactivate your account.

b. 

3. Now you can login with your account.

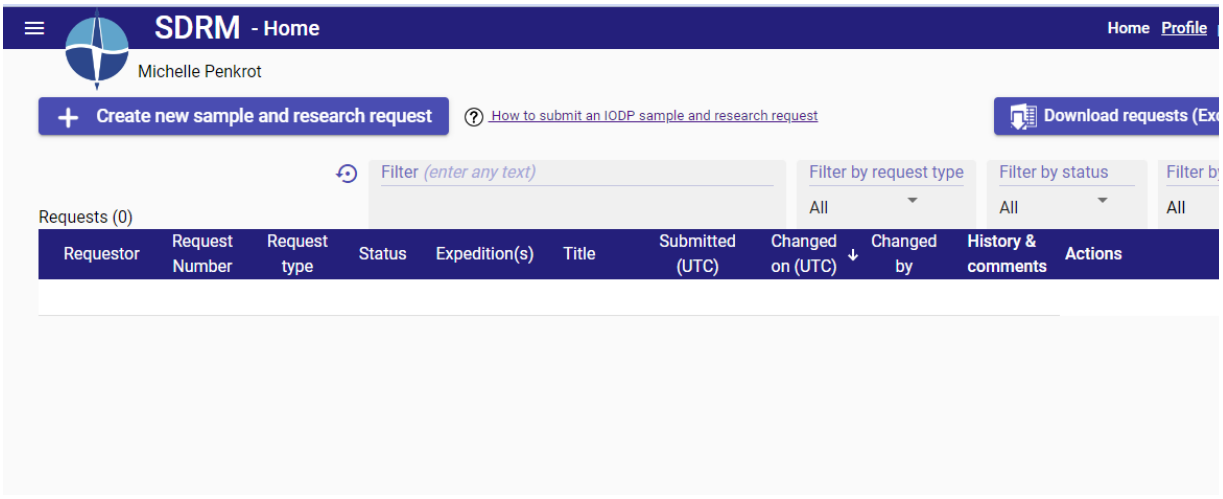
3. Submitting a new sample request

- Create new sample and research request (for "Past" expeditions that are out of moratorium)
- Create new sample and research request (for "Future and Moratorium" expeditions)
- Create new sample and research request (for conducting scanning XRF work at the repository)

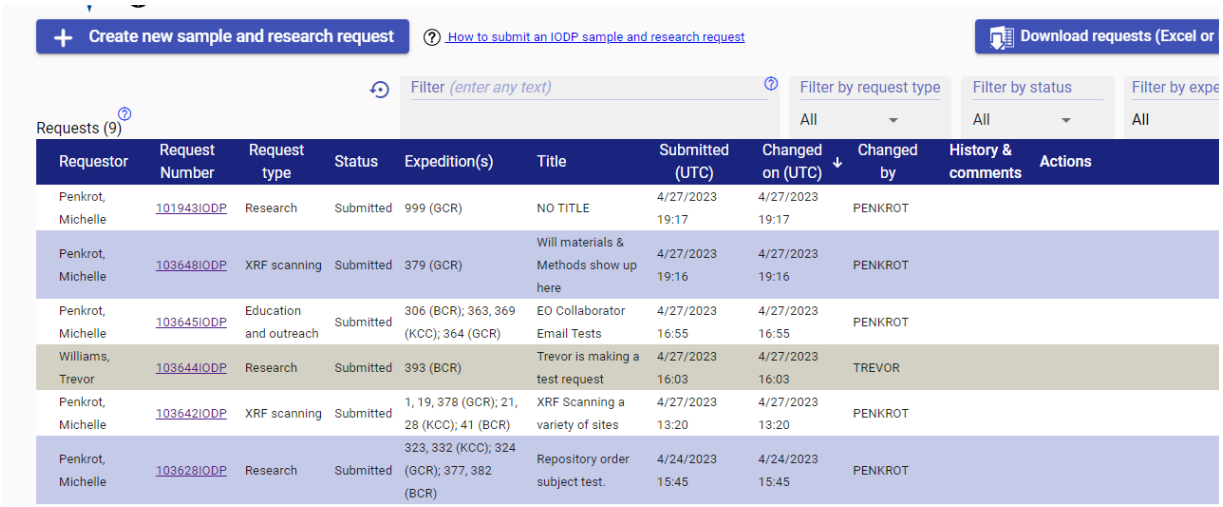
Create new sample and research request (for "Past" expeditions that are out of moratorium)

Note: All changes made to a sample request are automatically saved.

1. Click "Create new sample and research request".

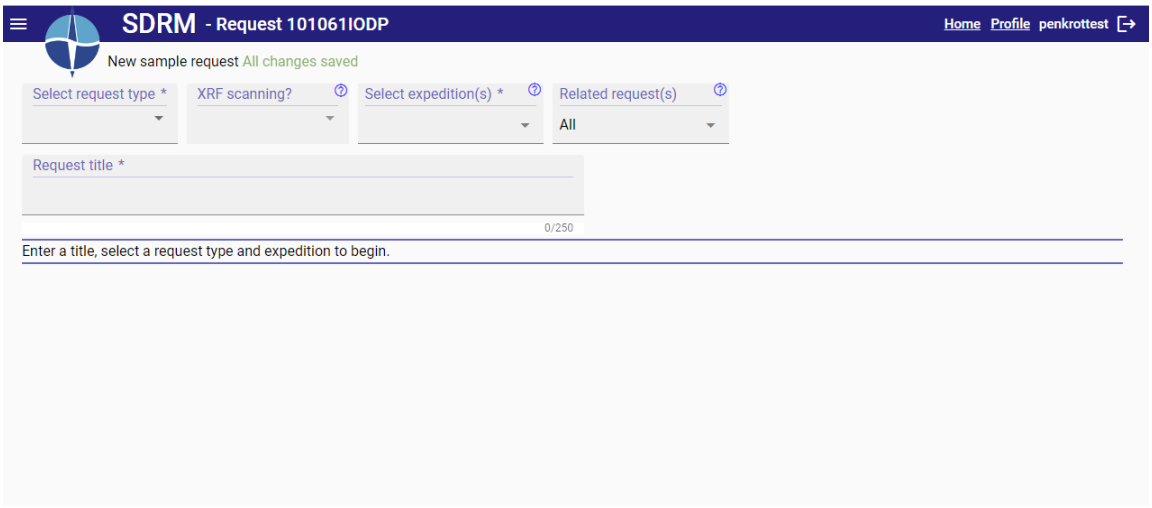


(Figure 3.1a: Home screen with no requests. If you are listed as a collaborator on a request, it will show up in this table, highlighted in yellow)



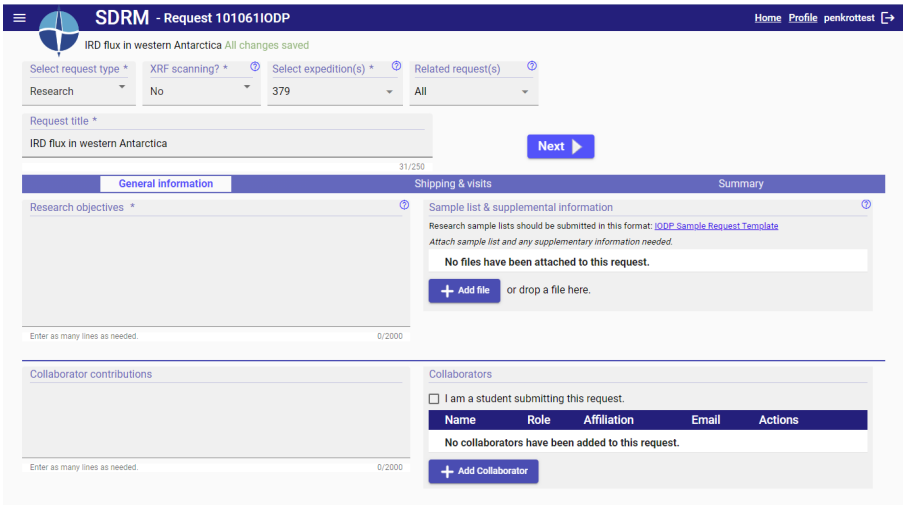
(Figure 3.1b: Home screen with multiple sample requests. Requests that you are listed as a Collaborator on appear in the table highlighted in yellow)

a. You are navigated to a new screen where request details are entered.
b. Each request is assigned a unique sample request number (i.e. 101058IODP).



(Figure 3.2: Initial screen when you are creating a new sample request.)

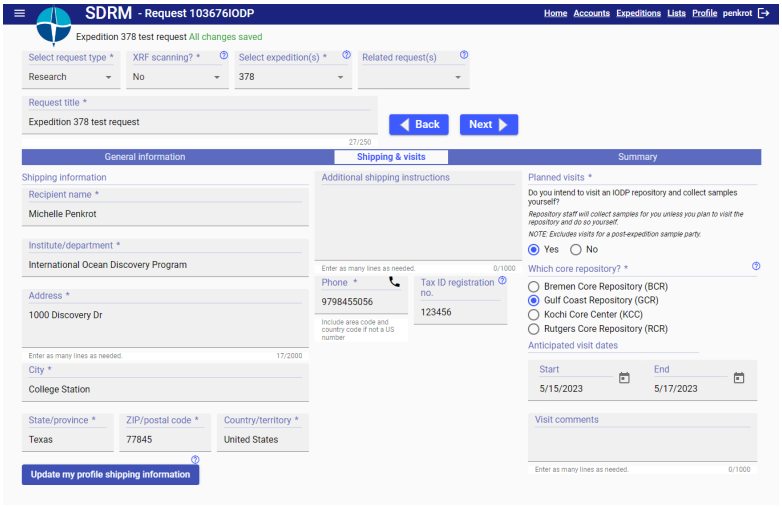
1. Enter a Request Type.
2. Indicate if the request is for XRF scanning or not.
    a. Please see additional information on XRF scanning in the SDRM Overview
    b. Post-expedition programmatic scanning XRF work does not require an additional sample request.
3. Select the expedition(s) that you will be requesting samples from.
    a. If you wish to request samples from multiple expeditions where one is in moratorium and one is out of moratorium, they must be submitted separately.
    b. Right column indicates which repository the core sections are curated at.
        i. BCR: Bremen Core Repository
        ii. GCR: Gulf Coast Repository
        iii. KCC: Kochi Core Center
        iv. RCR: Rutgers Core Repository
4. If applicable, note any related sample requests using the 'Related request(s)' dropdown.
    a. Click on the related request in the dropdown or type in the request number and select it.
5. Enter a request title.
    a. Once all required information has been entered, new headers with titles 'General Info,' 'Shipping & visits,' and 'Summary' should populate. Additionally, new sections titled 'Research objectives,' 'Collaborator contributions,' 'Collaborators,' and 'Attached files' should populate. If they have not, make sure that all previous steps have been completed.



(Figure 3.3: General Information, Shipping & Visits, and Summary tab appears after filling out initial request information).

1. Enter Research Objectives.
    a. This is a short (<2000 words) summary of your research goals and methods.
        i. For Education and Outreach requests, an education and outreach plan is required here instead.
    b. If you wish to include additional supporting information, you may attach files as "Supplemental information".
2. If applicable, enter collaborator contributions
    a. Briefly (<2000 words) summarize how other researchers will contribute to your project.
        i. For Education and Outreach requests, Broad impacts are requested here instead.
3. If applicable, click 'Add Collaborator' to add a collaborator to the request. Enter their name, role, affiliation, and email address into the pop-up window.
    a. Those listed as co-requestors or advisors will receive notifications about the status of this request.

4. If you are a student submitting the request, please check the box to indicate this and provide your advisor/supervisor's contact information with the "Add Collaborator" function.
5. Attach a sample list and any other files you would like to include with your request.
    a. A sample list template Excel file is available to download from this section titled 'IODP Sample Request Template".
    b. File types *.xls, *.xlsx, *.doc, *.docx, *.pdf, *.csv, *.txt, *.jpg, *.png, and *.tiff are all permitted to be attached to the sample request.
    c. *Failure to include a sample list with your request will delay review of your request.*
6. Click "Next" to navigate to the "Shipping and Visits" page.
7. Verify shipping and contact information for the samples from this request.
    a. All shipping information is loaded with the default shipping information from the user's profile.
        i. If you wish to update the shipping information in your profile, please click "Update my profile shipping information".
    b. The Tax ID field is primarily used for shipping sample from the USA to some other regions such as the UK, EU, and Brazil. Including this information may help expedite shipping of your request. If this information is not provided, but required for shipping. Repository staff will contact you for this information
8. Indicate if you plan to visit a repository to collect the samples yourself.
    a. If you cannot visit, repository staff will collect and ship the samples to you.
    b. If you plan to visit, please indicate which repository you intend to go to and your anticipated visit dates.
        i. Please email repository curator to confirm request approval and visit dates before making travel arrangements.



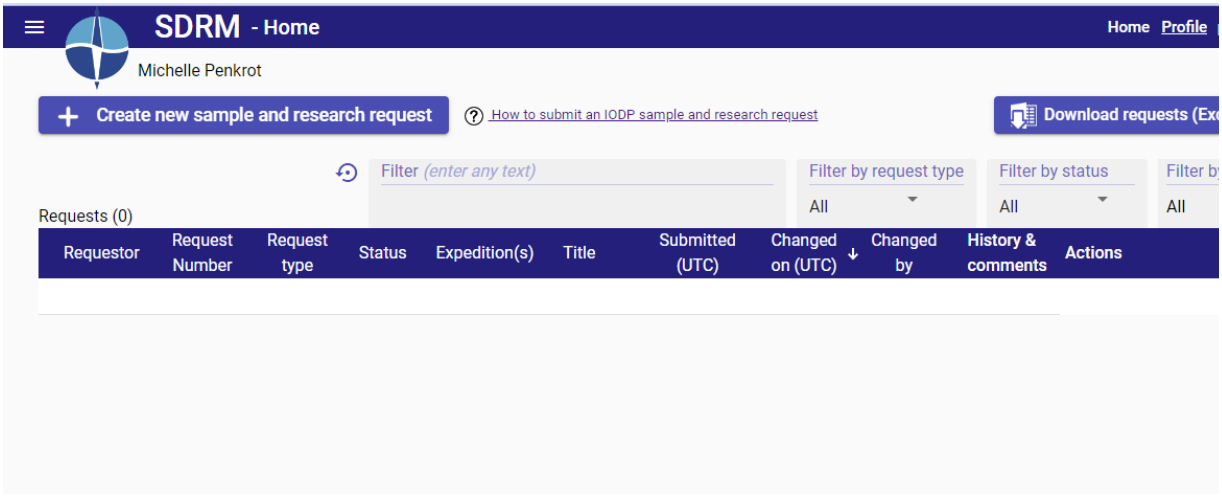
(Figure 3.4: Shipping and Information page.)

1. Click the 'Next' button to navigate to the request "Summary" page.
2. Review all request information is correct.
    a. You can click on on 'Download Request' to get a pdf summary of the request.
3. Click the 'Submit' button. A pop-up window will appear with the 'IODP Sample, Data, and Obligations Policy and Implementation.' You must read and acknowledge this document before submitting the request.
4. This sample request will now appear as "Submitted" on your home screen and will be reviewed by an IODP curator.
    a. If you need to edit the request, please contact an IODP curator.

Create new sample and research request (for "Future and Moratorium" expeditions)

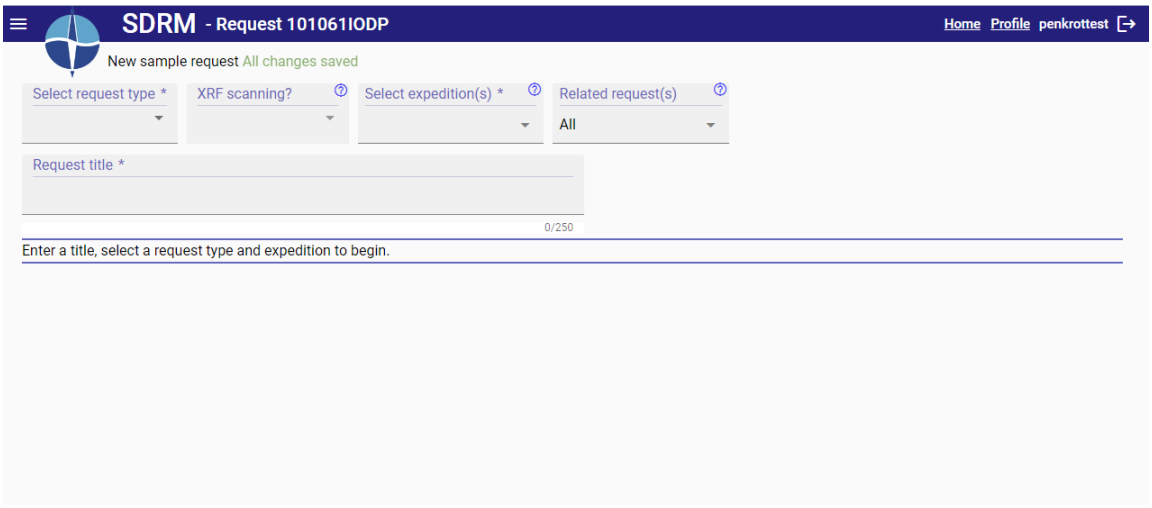
Note: All changes made to a sample request are automatically saved.

1. Click "Create new sample and research request".



(Figure 3.5: Home screen with no requests. If you are listed as a collaborator on a request, it will show up in this table, highlighted in yellow)

a. You are navigated to a new screen where request details are entered.
b. Each request is assigned a unique sample request number (i.e. 101061IODP).



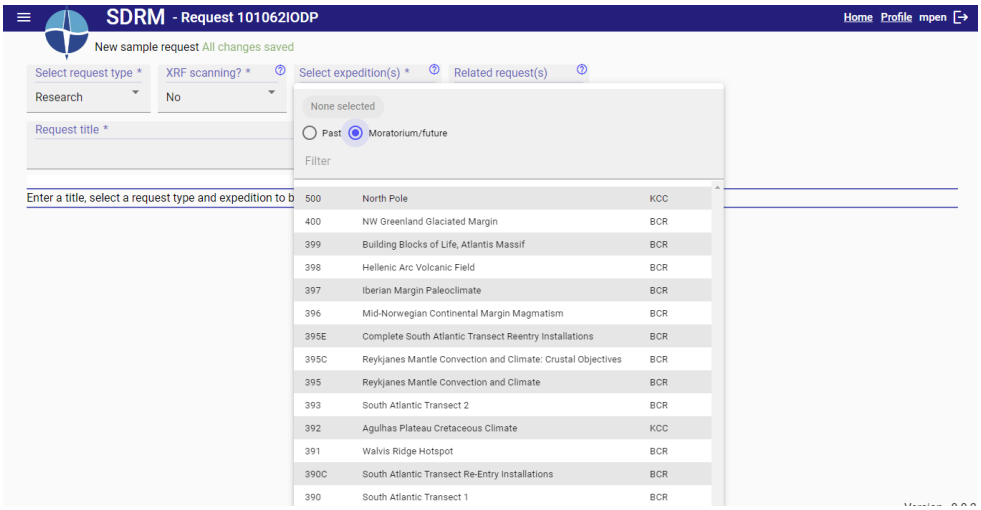
(Figure 3.6: Initial screen when you are creating a new sample request.)

2. Enter a Request Type.

3. Indicate if the request is for XRF scanning or not.

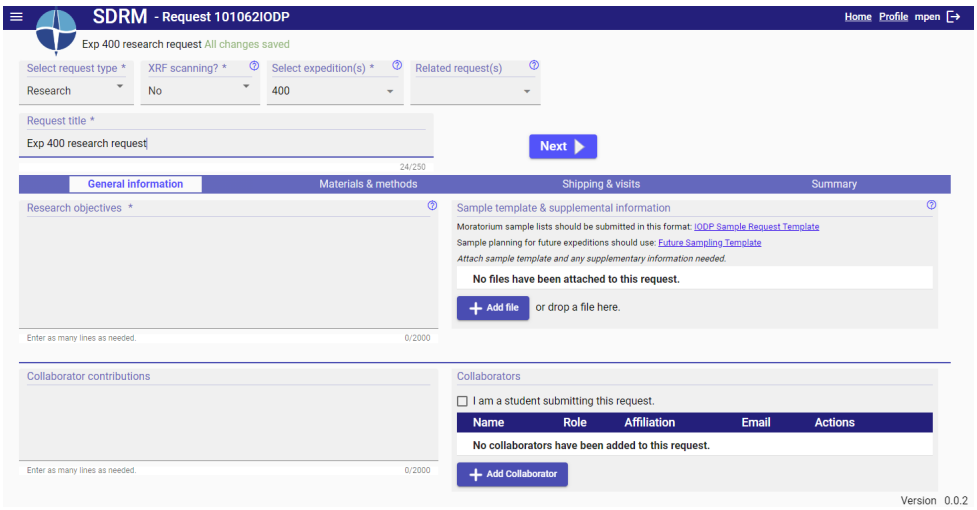
    a. Please see additional information on XRF scanning in the SDRM Overview
    b. Post-expedition programmatic scanning XRF work does not require an additional sample request.

2. Select the expedition that you will be requesting samples from.



(Figure 3.7: Select "Moratorium/Future" in the "Select Expedition(s)" dropdown to view all expeditions that have yet to sail and those which have been completed, but are still in moratorium.)

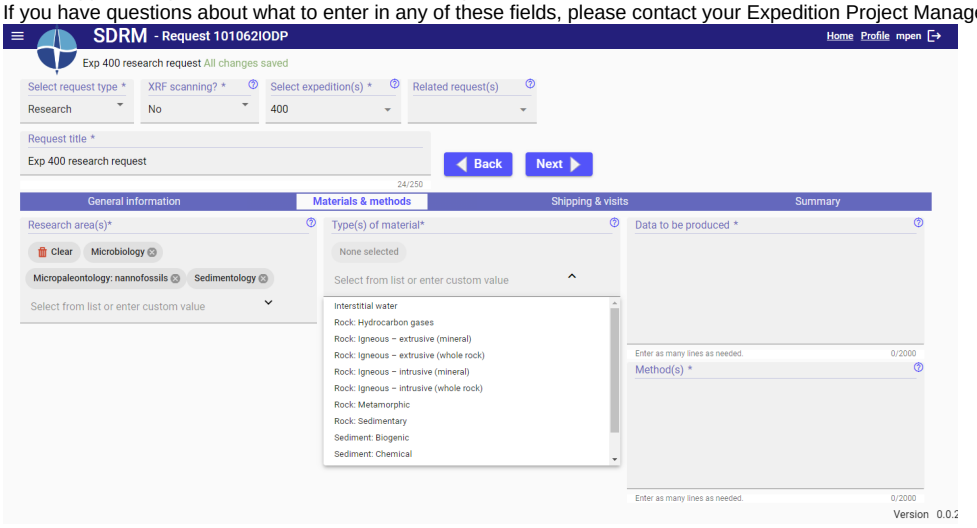
   a. Right column indicates which repository the core sections are curated at.
      i. BCR: Bremen Core Repository
      ii. GCR: Gulf Coast Repository
      iii. KCC: Kochi Core Center
      iv. RCR: Rutgers Core Repository
2. If applicable, note any related sample requests using the ‘Related request(s)’ dropdown.
   a. Click on the related request in the dropdown or type in the request number and select it.
3. Enter a request title.
   a. Once all required information has been entered, new headers with titles ‘General Info', 'Materials & methods', ‘Shipping & visits,’ and ‘Summary’ should populate. Additionally, new sections titled ‘Research objectives,’ ‘Collaborator contributions,’ ‘Collaborators,’ and ‘Attached files’ should populate. If they have not, make sure that all previous steps have been completed.



(Figure 3.8: General Information, Materials & methods, Shipping & Visits, and Summary tab appears after filling out initial request information.)

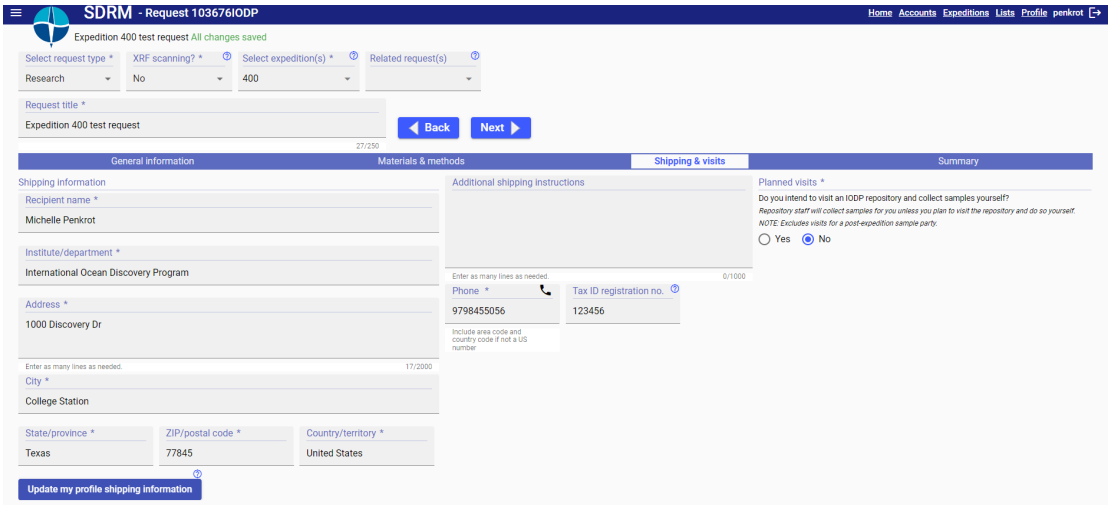
1. Enter Research Objectives.
   a. This is a short (<2000 words) summary of your research goals and methods.
      i. When submitting a request for upcoming expedition, you will have an opportunity to revise your Research Objectives based on the material recovered during the expedition.
      ii. For more information, please contact your Expedition Project Manager.
      iii. For Education and Outreach requests, Broad impacts are requested here instead.
   b. If you wish to include additional supporting information, you may attach files as "Supplemental information".
2. If applicable, enter collaborator contributions
   a. Briefly (<2000 words) summarize how other researchers will contribute to your project.
      i. For Education and Outreach requests, Broad impacts are requested here instead.
3. If applicable, click ‘Add Collaborator’ to add a collaborator to the request. Enter their name, role, affiliation, and email address into the pop-up window.
   a. Those listed as co-requestors or advisors will receive notifications about the status of this request.
4. If you are a student submitting the request, please check the box to indicate this and provide your advisor/supervisor's contact information with the "Add Collaborator" function.

5. Attach a sample list and any other files you would like to include with your request.
    a. Two sample list template Excel file is available to download from this section titled 'IODP Sample Request Template" and "Future Sampling Template".
        i. *For future expeditions, please fill out and submit the "Future Sampling Template".*
    b. File types *.xls, *.xlsx, *.doc, *.docx, *.pdf, *.csv, *.txt, *.jpg, *.png, and *.tiff are all permitted to be attached to the sample request.
    c. *Failure to include a sample list with your request will delay review of your request.*
6. Click "Next" to navigate to the "Materials & Methods" page.
7. Enter Information in the "Research Area(s)", Type(s) of material", "Data to be produced" and "Method(s)" fields.
    a. Where applicable, please select values from the dropdown lists or enter custom information.
    b. If you have questions about what to enter in any of these fields, please contact your Expedition Project Manager.
    c.



(Figure 3.9: Example of Material & Methods page).

1. Click "Next" to navigate to the "Shipping and Visits" page.
2. Verify shipping and contact information for the samples from this request.
    a. All shipping information is loaded with the default shipping information from the user's profile.
3. Indicate if you plan to visit a repository to collect the samples yourself.
    a. If you are sailing on an upcoming expedition, you do not need to select "yes" here.



(Figure 3.10: Example of shipping & visits page when submitting a moratorium request).

1. Click the 'Next' button to navigate to the request "Summary" page.
2. Review all request information is correct.
    a. You can click on on 'Download Request' to get a pdf summary of the request.
3. Click the 'Submit' button. A pop-up window will appear with the 'IODP Sample, Data, and Obligations Policy and Implementation.' You must read and acknowledge this document before submitting the request.
4. This sample request will now appear as "Submitted" on your home screen and will be reviewed by an IODP curator.
    a. If you need to edit the request, please contact an IODP curator.

Create new sample and research request (for conducting scanning XRF work at the repository)

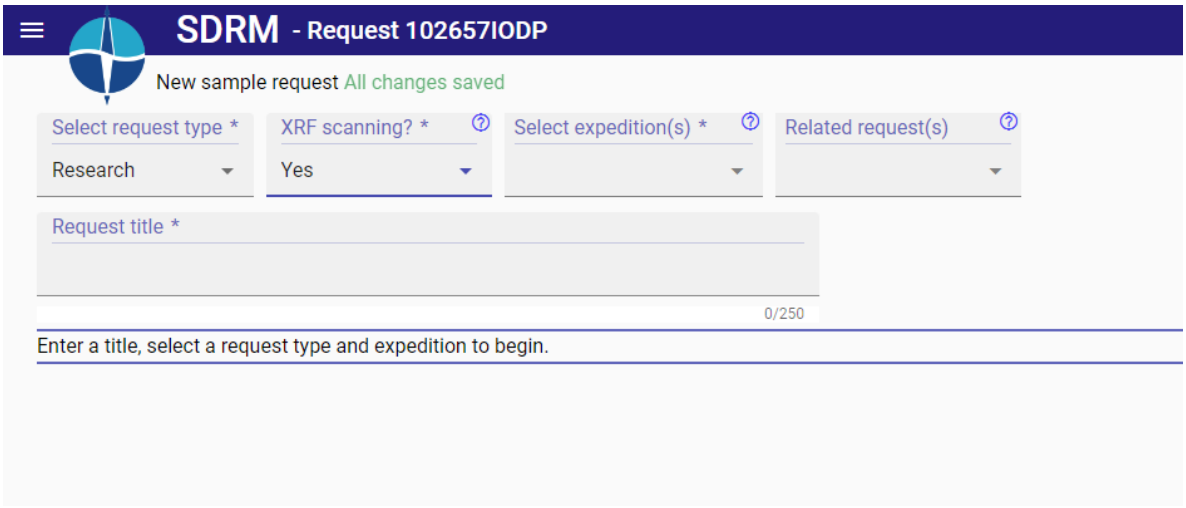
The BCR, GCR and KCC all have scanning XRF facilities located at their repositories. Requests can be made to conduct scanning XRF analyses on IODP cores. Prior to submitting a sample request to conduct XRF scanning on IODP cores, please contact the repository you want to scan at for details on this analyses. More information about the scanning XRF capability at each repository can be found here:

BCR - https://www.marum.de/en/Infrastructure/XRF-Core-Scanner.html

GCR - https://iodp.tamu.edu/labs/xrf/

KCC - http://www.kochi-core.jp/en/facilities_and_equipment/corelogging.html#5

1. Scanning XRF request are considered a "Research" request type
2. When submitting a sample request for Scanning XRF analyses, under "XRF Scanning?", please select "Yes". Then, select the expedition and enter a title for your request.



(Figure 3.11: Example of how to start an XRF scanning request).

3. Enter Research Objectives.

   a. This is a short (<2000 words) summary of your research goals and methods.
   b. If you wish to include additional supporting information, you may attach files as "Supplemental information".

4. If applicable, enter collaborator contributions

   a. Briefly (<2000 words) summarize how other researchers will contribute to your project.
      i. For Education and Outreach requests, Broad impacts are requested here instead.

5. If applicable, click 'Add Collaborator' to add a collaborator to the request. Enter their name, role, affiliation, and email address into the pop-up window.

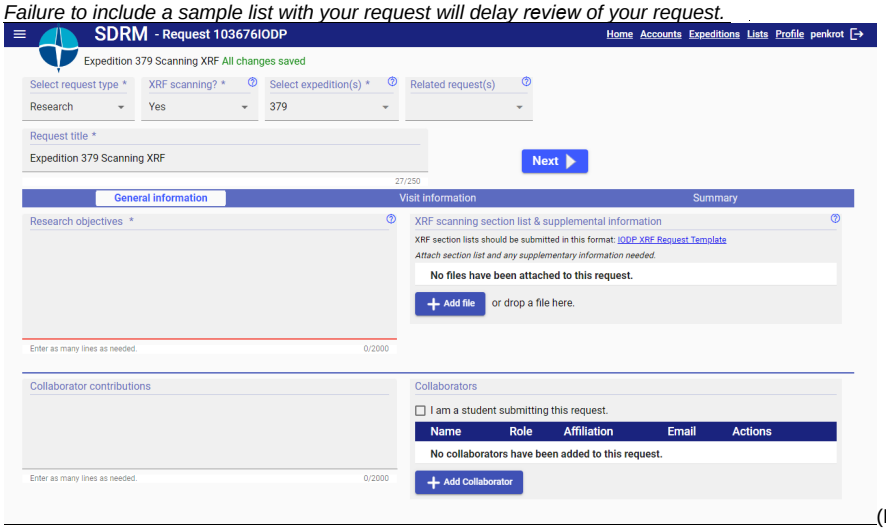
   a. Those listed as co-requestors or advisors will receive notifications about the status of this request.

6. If you are a student submitting the request, please check the box to indicate this and provide your advisor/supervisor's contact information with the "Add Collaborator" function.

7. Attach a list of the core sections that you want to XRF scan, including basic information on the measurement interval and scanning conditions.

   a. A sample list template Excel file is available to download from this section titled 'IODP XRF Request Template".
   b. File types *.xls, *.xlsx, *.doc, *.docx, *.pdf, *.csv, *.txt, *.jpg, *.png, and *.tiff are all permitted to be attached to the sample request.

c. *Failure to include a sample list with your request will delay review of your request.*



(Figure 3.12: Example of General Information required for XRF scanning requests).

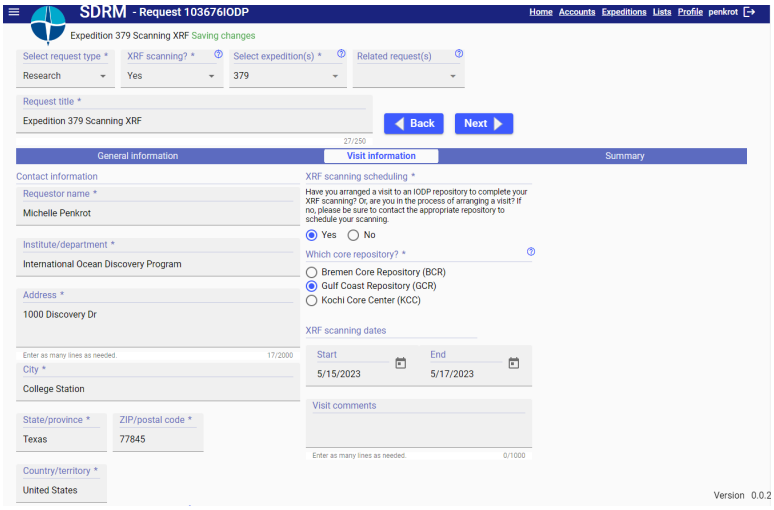
8. Click "Next" to navigate to the "Visit Information" page.

9. Verify your contact information for the XRF request.

    a. This contact information should be for the main point of contact for the request.

10. Indicate if you have already been in contact with the appropriate repository to conduct the XRF scanning.

    a. If you have not already contacted the repository where you want to conduct XRF scanning, please select "No"
    b. If you have already been in contact with the repository, please select "Yes"
        i. Please indicate which repository you intend to go to and your anticipated visit dates.
        ii. Please email repository curator to confirm request approval and visit dates before making travel arrangements.



(Figure 3.13: Example of the Visit Information for an XRF scanning request).

11. Click the ‘Next’ button to navigate to the request "Summary" page.

12. Review all request information is correct.

    a. You can click on on ‘Download Request’ to get a pdf summary of the request.

13. Click the ‘Submit’ button. A pop-up window will appear with the ‘IODP Sample, Data, and Obligations Policy and Implementation.’ You must read and acknowledge this document before submitting the request.

14. This sample request will now appear as "Submitted" on your home screen and will be reviewed by an IODP curator.

    a. If you need to edit the request, please contact an IODP curator.

4. Revising a sample request

At some point, you may need to revise a submitted sample request. This may be because you need to update your research objectives following sailing on an expedition, you forgot to attach a sample list, or an IODP curator asked you to revise your request.

Note: You cannot revise a request that has a request status of "Submitted", "Approved", "Completed", "Rejected", "Retired". If a revision is required, an IODP curator will set your request to "Revise".

1. On the home screen, select the request you would like to revise. The status of this request should be "Revise".
2. Click on the "Edit" button under the "Actions" column, on the right hand side of the screen.
3. Edit the request as necessary and then resubmit the request.
    a. Refer to instructions on submitting a new sample request, if additional information is needed.