EU-FarmBook

EU-FarmBook upload manual

A comprehensive guide to making contributions to the EU-FarmBook platform using the upload form

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Table of Contents

1. Introduction 4
2. STEP 1: Project information 4
3. STEP 2: Knowledge Object submission 6
4. STEP 3: Review & upload 15
5. Example use of the upload form 16

List of figures

Figure 1: Request for information about the source project. 4
Figure 2: Search and retrieval of project-related information from the CORDIS database. 5
Figure 3: Project-related information that needs to be provided as part of a Knowledge Object upload 5
Figure 4: “Next Step” and “Save draft” buttons to proceed to the next step of the upload process or save progress. 6
Figure 5: Notification message displayed in case not all the required information has been provided. 6
Figure 6: The project information provided in the 1st step of the upload process can be changed by clicking on the “Change project” link. 6
Figure 7: Uploading the digital file of the Knowledge Object as part of the submission process. 7
Figure 8: Successful Knowledge Object upload. 7
Figure 9: Knowledge Object upload failure 7
Figure 10: The field of the upload form where a short textual description (a summary) of what the Knowledge Object is about needs to be provided. 8
Figure 11: Selecting the type of the digital file through which the Knowledge Object becomes available. 8
Figure 12: Upload form field to provide keywords. 8
Figure 13: Selection of Knowledge Object topic(s). 9
Figure 14: Selection of Knowledge Object subtopic(s). 9
Figure 15: Upload form section for the addition of the creator(s) of the Knowledge Object. 10
Figure 16: Adding the language of the Knowledge Object. 10
Figure 17: Selecting the Knowledge Object’s language from the dropdown list made available. 10
Figure 18: Selecting the Knowledge Object’s license. 11
Figure 19: Selecting the “intended purpose” of the Knowledge Object. 11
Figure 20: Section of the upload form to provide the date of completion of the Knowledge Object. 11
Figure 21: Selecting the geographic location(s) the content of the Knowledge Object relates to. 12
Figure 22: Indication of the geographic location(s) related to the content of the Knowledge Object by selecting one or more countries from the dropdown list. 12

Figure 23: “Save draft” and “Submit” buttons at the bottom of the upload form’s screen associated with the 2nd step of the upload process (namely, the “Knowledge Object submission”) 12
Figure 24: Notification presented in case of incomplete Knowledge Object metadata. 12
Figure 25: Info button on the right side of the title of each upload form section enabling access to a short explanation of the related piece of metadata and is expected as a value. 13
Figure 26: “Add another Knowledge Object” button. 13
Figure 27: Metadata preview and editing (if needed) before proceeding to the submission of a Knowledge Object 14
Figure 28: Final Knowledge Object overview before its submission and the end of the upload process. 15
Figure 29: Searching for information for the AFINET project using the “Find your project” section of the upload form. 16
Figure 30: Details of the AFINET project added in the fields of the upload form related to the 1st step of the Knowledge Object submission. 17
Figure 31: Short text summary of the Knowledge Object added in the “File Summary” field. 17
Figure 32: The file type of the Knowledge Object is selected. 17
Figure 33: The Knowledge Object’s DOI is provided as a value to the “Document Object Identifier” field of the upload form. 18
Figure 34: The Knowledge Object keywords added in the respective field of the upload form. 18
Figure 35: Selection of the topics of the Knowledge Object. 18
Figure 36: Selection of the subtopic of the Knowledge Object. 18
Figure 37: Names and email addresses of the Knowledge Object creators provided to the upload form. 19
Figure 38: Selection of the language of the Knowledge Object. 19
Figure 39: Creative Commons license under which the Knowledge Object becomes available. 19
Figure 40: Identification of the Knowledge Object’s “Intended Purpose”. 19
Figure 41: Date of completion of the Knowledge Object. 20
Figure 42: Locations to which the content of the Knowledge Object relates. 20
Figure 44: Knowledge Object preview before its final submission to the EU-FarmBook platform 20

1. Introduction

This document is a guide to the use of the EU-FarmBook platform's upload form. Its aim is to provide a walkthrough of the Knowledge Object upload process by presenting and explaining the key features of the upload form. This step-by-step process is explained in the next sections. Using the form, the upload of a Knowledge Object is implemented as a three-step process. In the first step, the contributor provides information about the project from which the Knowledge Object is available (i.e., the source of the Knowledge Object). In the second step, key information for the Knowledge Object (i.e., the metadata of the Knowledge Object) is provided. All the information needs to be provided in English. This document shall be read together with the EU-FarmBook metadata guide to become familiar with the metadata expected by contributors for each Knowledge Object they will contribute to the EU-FarmBook platform. An illustrative example of the use of the upload form is provided to better showcase the upload process.

2. STEP 1: Project information

As illustrated in Figure 1 below, the upload of a Knowledge Object using the upload form is implemented as a three-step process. For each step, a different screen of the form is used. The step executed each time is highlighted at the top of the screen.

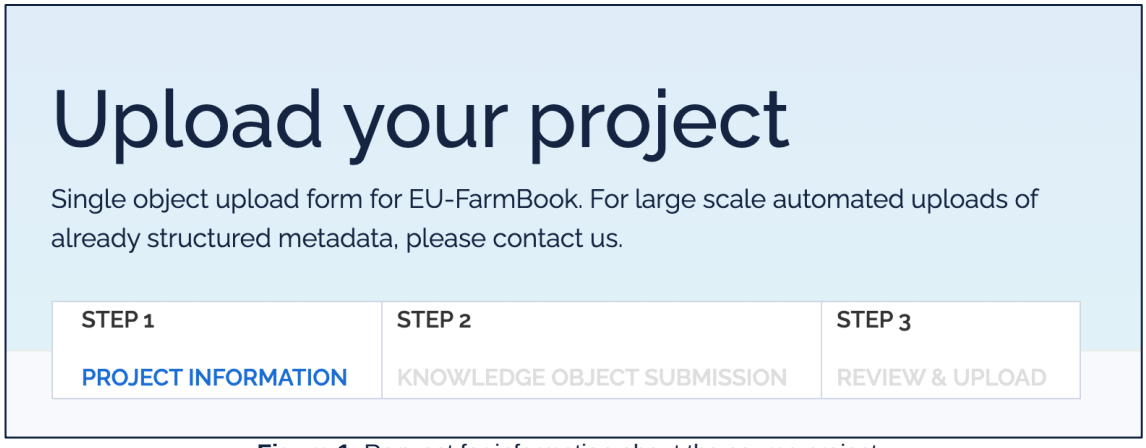

Figure 1: Request for information about the source project.

The upload process starts with the request for information about the project from which the Knowledge Object is available. Project information can be added either automatically or manually. To have the project information automatically filled in, one of the following pieces of information needs to be provided: (i) project acronym; (ii) project full name; (iii) Grant Agreement ID; or (iv) DOI[1]. This information shall be typed in the text field available in the "Find your project" section of the upload form. By providing one of those pieces of information and clicking the "Search" button, a list of projects becomes available.

[1] Recently, CORDIS has introduced the use of DOIs (Digital Object Identifiers) as an additional way for the unique identification of projects apart from their Grant Agreement ID. Details about what a DOI is can be found at https://www.doi.org/the-identifier/what-is-a-doi/.

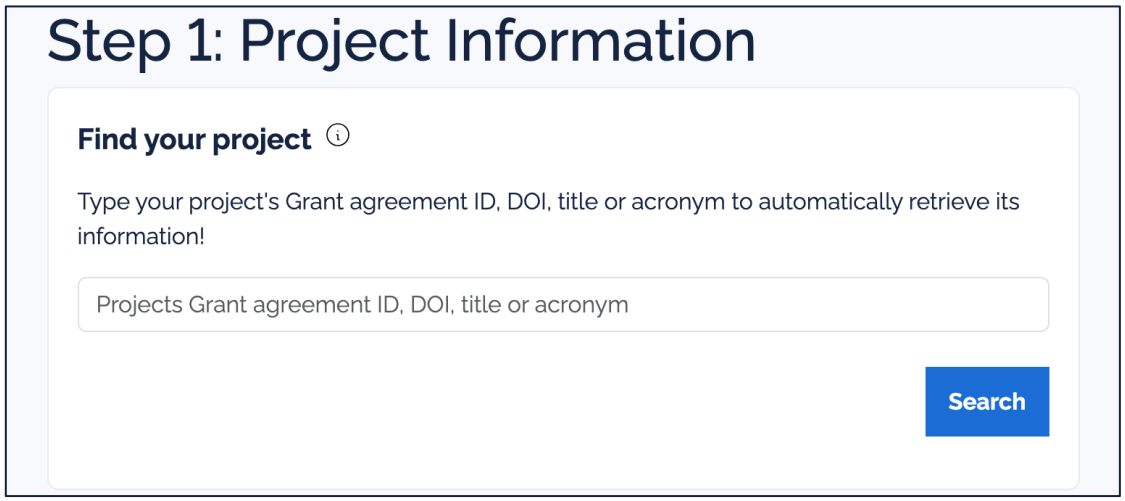

Figure 2: Search and retrieval of project-related information from the CORDIS database.

Clicking on one of the suggested projects will result in the automated completion of the fields “Project's title/full name”, “Project's Acronym”, and “Summary”, which are shown in Figure 3. The only field that will still need to be manually completed is “Project Website”.

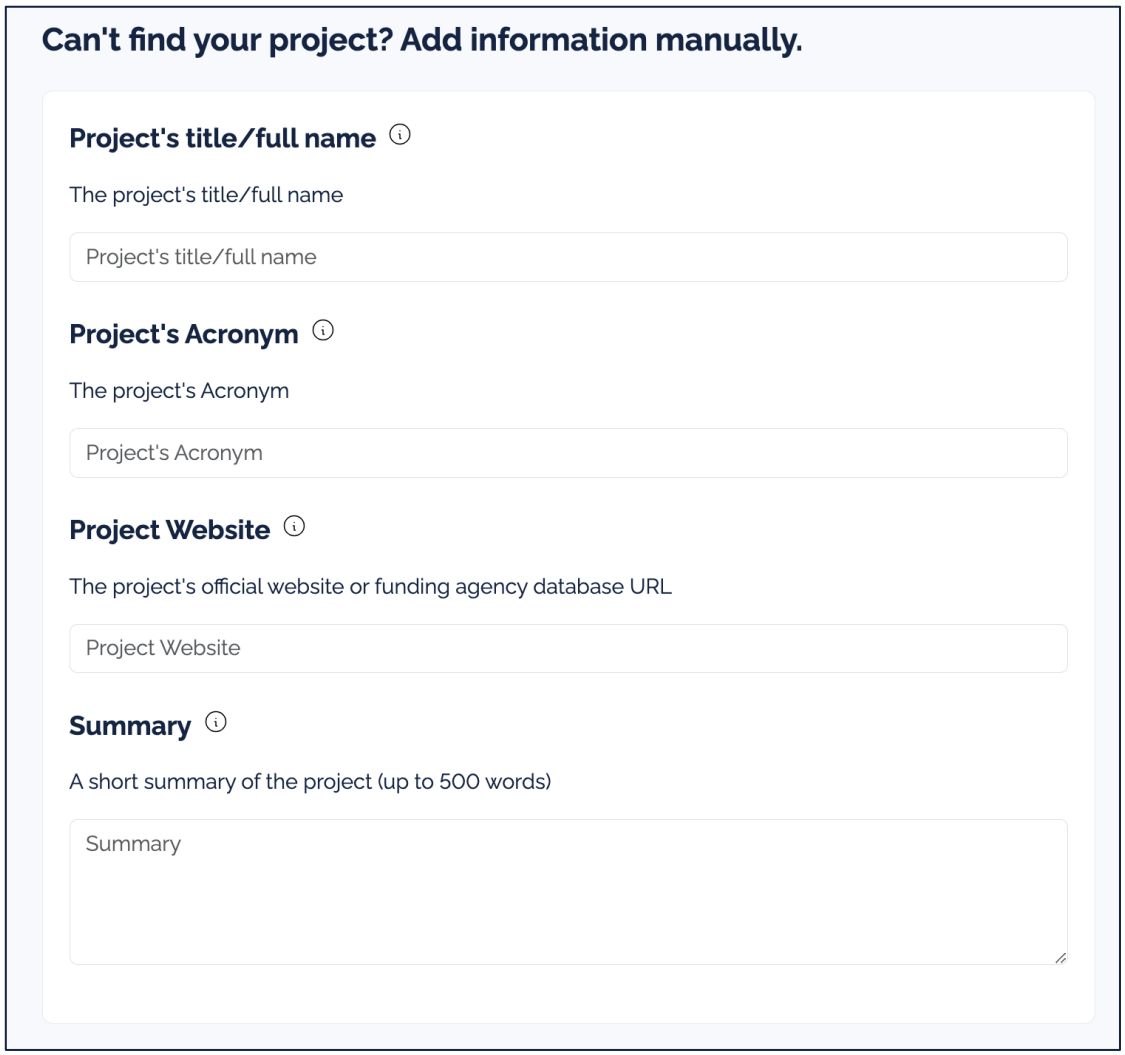

Figure 3: Project-related information that needs to be provided as part of a Knowledge Object upload.

Alternatively, all the project-related information can be manually provided without using the automatic project information retrieval (done in the “Find your project” section) at all. After having provided the information needed as part of the 1st step of the upload process, the Knowledge Object contributor can proceed to the 2nd step or save the progress made so far by clicking the “Save draft” button (see Figure 4).

Figure 4: “Next Step” and “Save draft” buttons to proceed to the next step of the upload process or save progress.

In case there is information that has not been provided, a notification message is shown to inform about the need to fill all the required fields in (see Figure 5).

Figure 5: Notification message displayed in case not all the required information has been provided.

3. STEP 2: Knowledge Object submission

The 2nd step of the upload process is about the submission of the Knowledge Object by providing its metadata (a detailed presentation and explanation of the metadata used for Knowledge Object description is provided in the EU-FarmBook metadata guide). Before proceeding with the submission of a Knowledge Object, there is potential to change the project information provided in the 1st step. As illustrated in Figure 6, clicking the “Change project” link lets the contributor return to the previous step and provide the project-related information again.

Figure 6: The project information provided in the 1st step of the upload process can be changed by clicking on the “Change project” link.

The submission of a Knowledge Object starts with the upload of the digital file via which the Knowledge Object becomes available. This is done by either dragging and dropping the Knowledge Object file in the rectangular area, shown in Figure 7, which is framed by the dotted line, or using the dialog box that opens when clicking the “Choose a file” link. As indicated, there is a limit of 50 MBs (Megabytes) in the size of the Knowledge Objects to be provided.

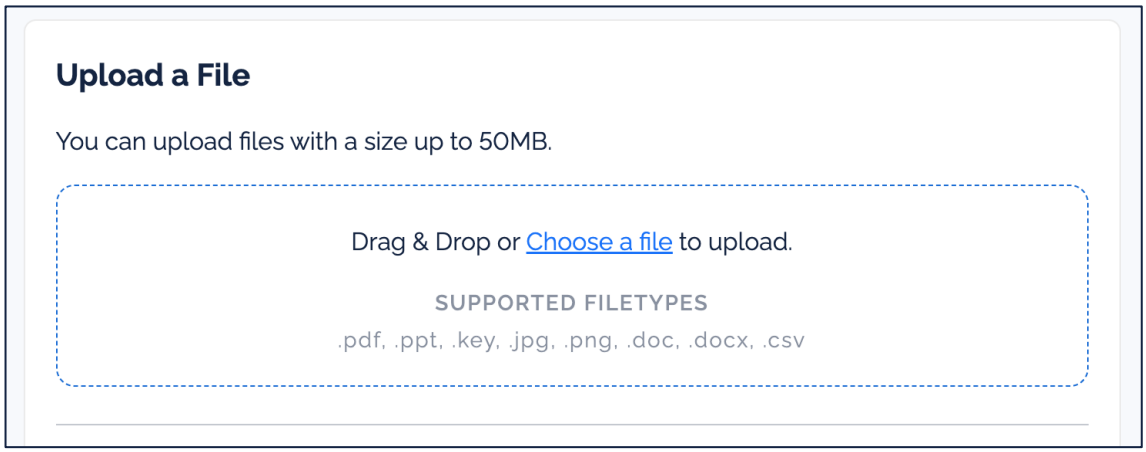

Figure 7: Uploading the digital file of the Knowledge Object as part of the submission process.

After selecting the Knowledge Object for upload, a notification for the upload's success is provided (see Figure 8 below).

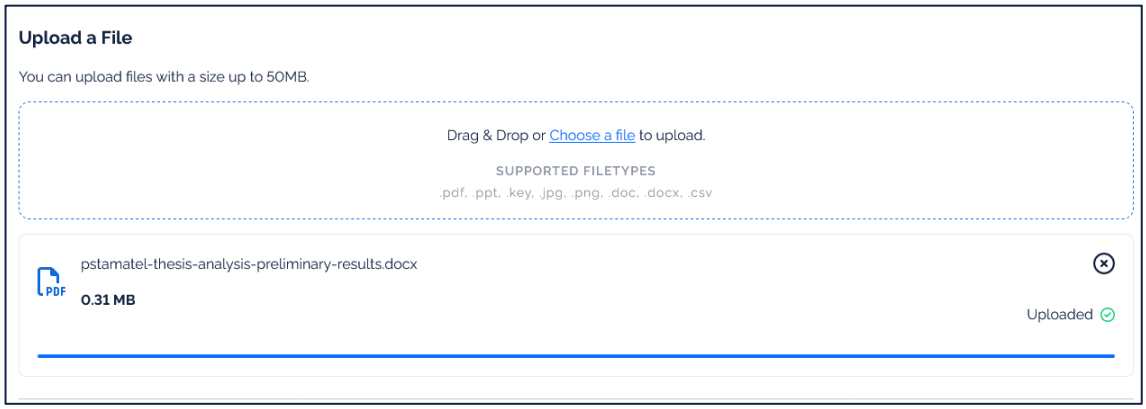

Figure 8: Successful Knowledge Object upload.

In the case that the Knowledge Object was uploaded sometime before, an upload failure message informs that the Knowledge Object upload is already done (see Figure 9).

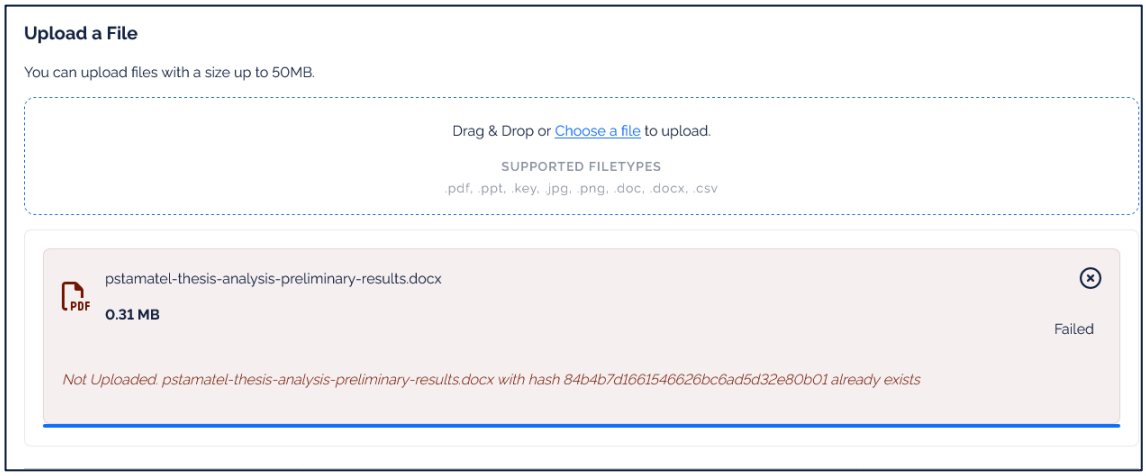

Figure 9: Knowledge Object upload failure

After uploading the digital file of the Knowledge Object, what needs to be done next is to provide the Knowledge Object's metadata. As illustrated in Figure 10, the first metadata

piece to provide is a summary of the Knowledge Object. This is a short textual description (not more than 500 words) of what the (content of the) Knowledge Object is about.

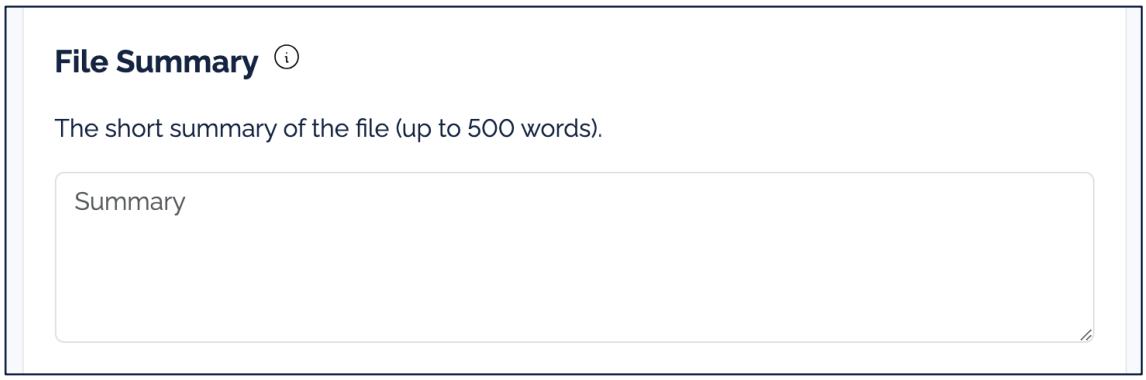

Figure 10: The field of the upload form where a short textual description (a summary) of what the Knowledge Object is about needs to be provided.

Then, the type of the digital file through via the Knowledge Object becomes available is provided. The Knowledge Object contributor can select one of the options: “Document”, “Slideshow/presentation”, “Podcast”, “Dataset”, “Video”, “Image”, or “Software Application” as shown in Figure 11 below.

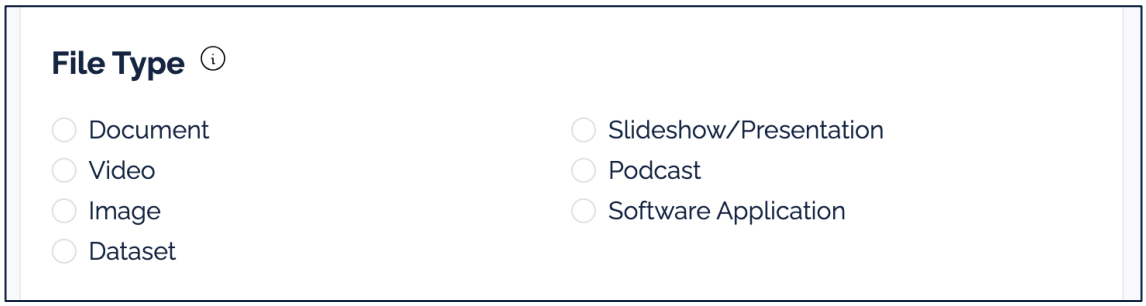

Figure 11: Selecting the type of the digital file through which the Knowledge Object becomes available.

In case a unique identifier is available for the Knowledge Object, this can be provided as a value to the “Document Object Identifier” field of the upload form. Keywords (i.e., words or short phrases indicative of the Knowledge Object’s content) are provided in the field named “Keywords”. In case of adding more than one keyword, these are separated using comma signs (“,”) as illustrated in Figure 12.

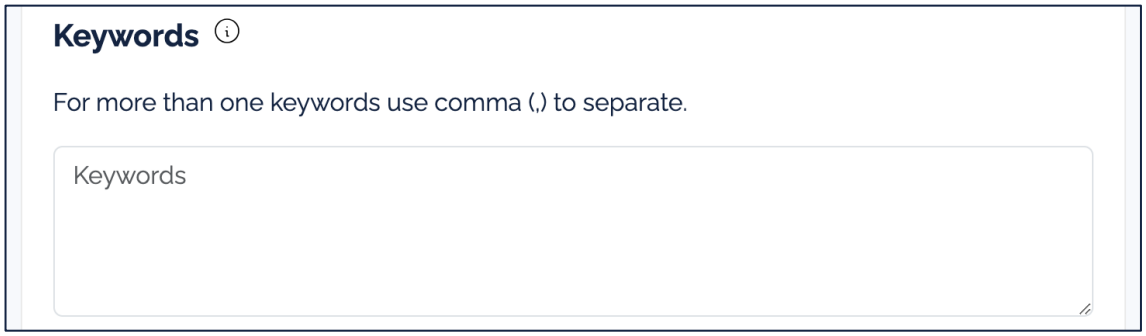

Figure 12: Upload form field to provide keywords.

The topic(s) and subtopic(s) of the Knowledge Object can be provided by clicking in the appropriate tick box(es) in the “Topics” and “Subtopics” fields. The Knowledge Object’s topic(s) are provided first. As shown in Figure 13, more than one topic can be selected.

Figure 13: Selection of Knowledge Object topic(s).

After selecting the topic(s) of the Knowledge Object, its subtopic(s) will need to be added using the section of the upload form that appears on the screen. The subtopics presented are associated with the topic(s) selected earlier. Again, one or more options are allowed (see Figure 14).

Figure 14: Selection of Knowledge Object subtopic(s).

The full name and emails of the creator(s) of the Knowledge Object (the persons involved in the creation of the Knowledge Object) are provided in the “Creators” section. Providing the full name (first and last name; middle name can be provided as well in case there is one) is mandatory. The email address of the Knowledge Object’s creator is optional (it is provided only in the case that this information exists). In case of a Knowledge Object that was created by more than one person, it is possible to add more names and emails by clicking the “Add creator +” button. When doing so, the creator’s name and email address provided previously are added to a list of Knowledge Object creators and the details of a new creator can be made available. The “Creators” section of the upload form is shown in Figure 15.

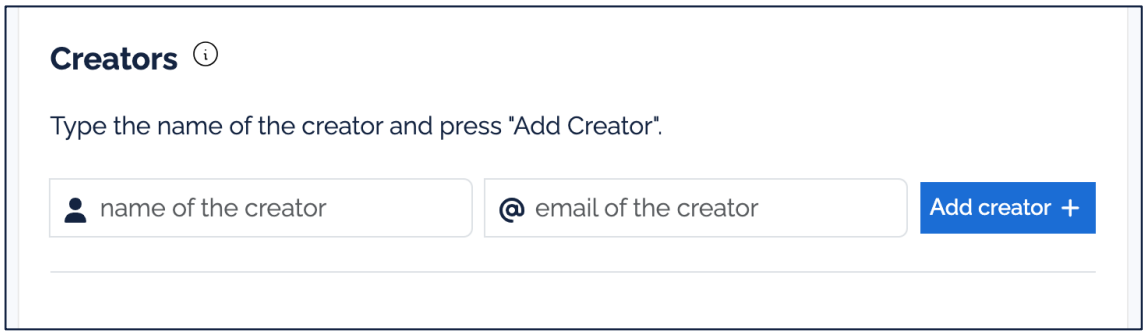

Figure 15: Upload form section for the addition of the creator(s) of the Knowledge Object.

The Knowledge Object's language is provided in the "Languages" section of the upload form (see Figure 16).

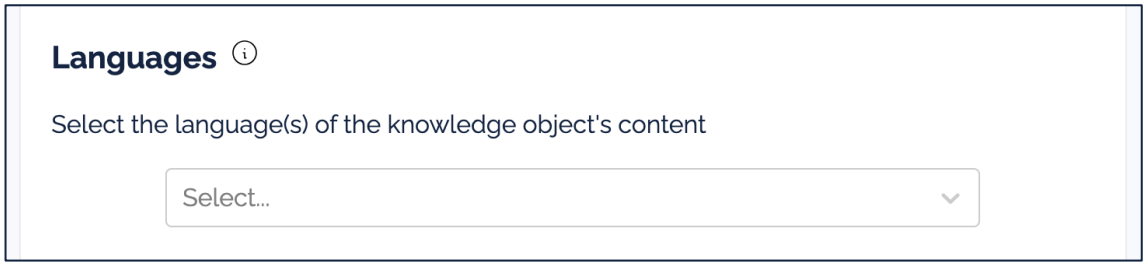

Figure 16: Adding the language of the Knowledge Object.

As shown in Figure 17, to provide the Knowledge Object's language, a selection can be made with the help of the dropdown list appearing when clicking on the "Select…" box.

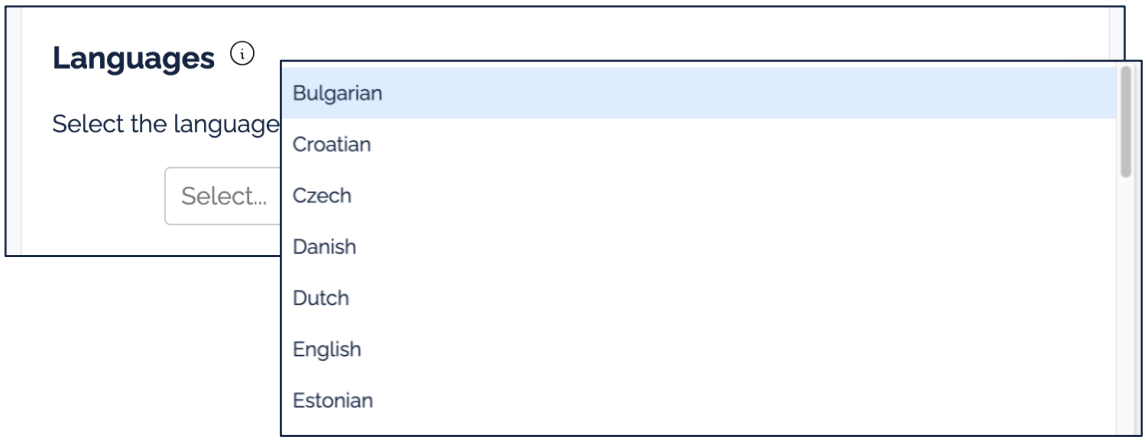

Figure 17: Selecting the Knowledge Object's language from the dropdown list made available.

The license under which the Knowledge Object will become available from the platform is selected by clicking the radio button on the left of the Creative Common license names (i.e., the small circle before the licence's name). Only one license can be selected for the Knowledge Object. Details about Knowledge Object licensing and the licenses available from Creative Commons can be found in the EU-FarmBook's metadata guide. Figure 18 below shows the "License" section of the upload form.

Figure 18: Selecting the Knowledge Object's license.

One of the final pieces of metadata needed to be provided for a Knowledge Object is the purpose for which the Knowledge Object was created. This can be done in the "Intended Purpose" section by clicking the appropriate radio button (i.e., small circle) appearing on the left side of the intended purposes listed (see Figure 19 below). One intended purpose can be selected.

Figure 19: Selecting the "intended purpose" of the Knowledge Object.

The date when the Knowledge Object was released is provided in the section "Date of Completion" of the upload form. It can be provided using the dropdown lists illustrated in Figure 20, which enable the selection of the day, month, and year of the completion date of the Knowledge Object.

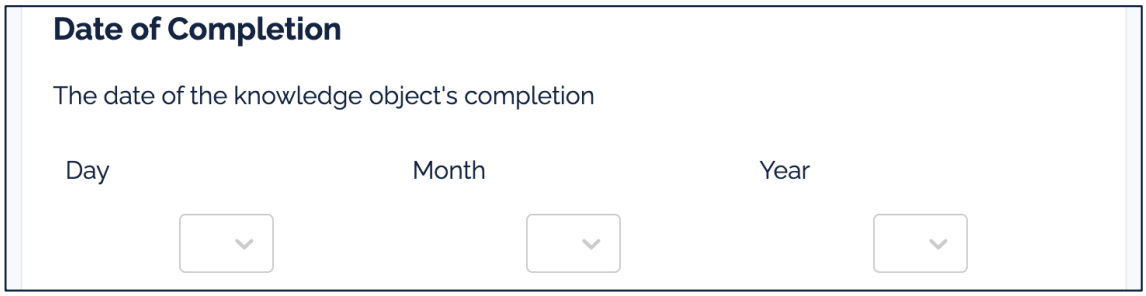

Figure 20: Section of the upload form to provide the date of completion of the Knowledge Object.

The final piece of metadata that needs to be provided is about indicating the geographic location(s) the content of the Knowledge Object relates to. This information can be made available in the "Locations" section of the upload form (see Figure 21)

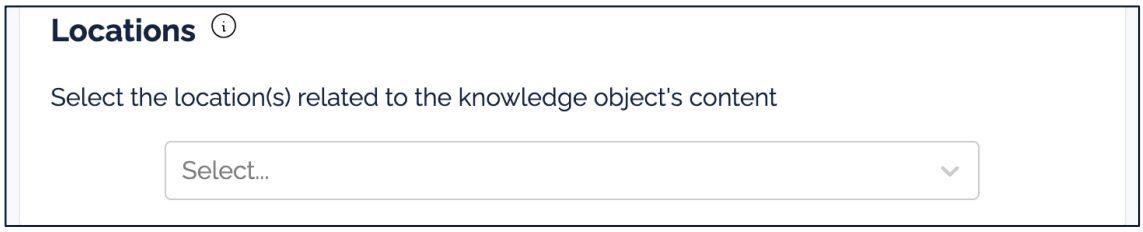

Figure 21: Selecting the geographic location(s) the content of the Knowledge Object relates to.

The indication of the geographic location(s) related to the Knowledge Object's content is made by selecting one or more countries from the dropdown list that becomes available when clicking the "Select…" box (see Figure 22).

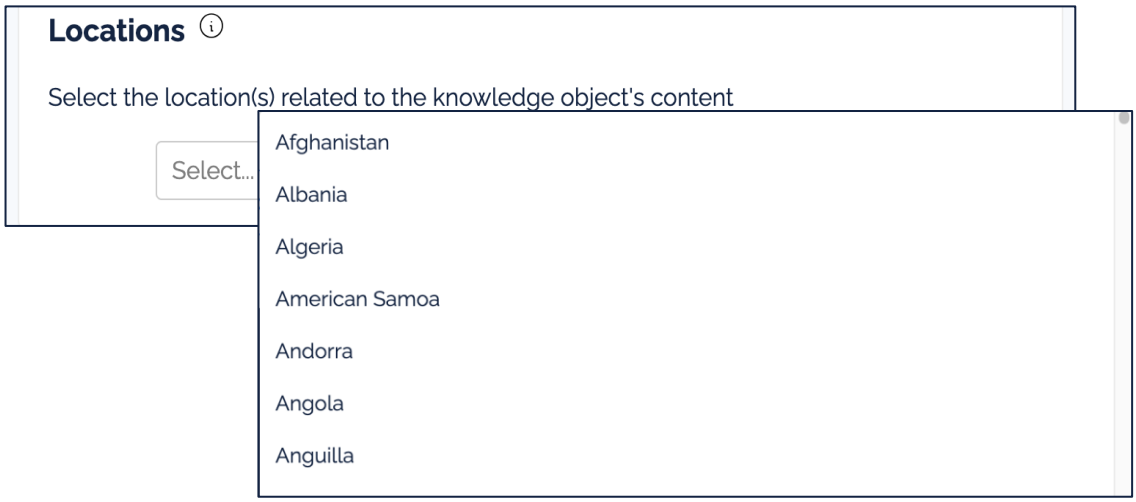

Figure 22: Indication of the geographic location(s) related to the content of the Knowledge Object by selecting one or more countries from the dropdown list.

After providing all metadata for the Knowledge Object, the "Submit" button can clicked in order to proceed with the Knowledge Object submission. Alternatively, the contributor of the Knowledge Object can click the "Save draft" button, save progress, and return later. The "Save draft" and "Submit" buttons appearing at the bottom of the screen associated with the 2nd step of the upload process are shown in Figure 23 below.

Figure 23: "Save draft" and "Submit" buttons at the bottom of the upload form's screen associated with the 2nd step of the upload process (namely, the "Knowledge Object submission")

In case not all Knowledge Object metadata is provided, a notification message ("Please fill in all required fields") will be presented. Proceeding to the next step of the process is not possible until all the required information is provided in the 2nd step (see Figure 24 below).

Figure 24: Notification presented in case of incomplete Knowledge Object metadata.

An info icon on the right side of each section's title (see Figure 25 below) provides access to a short textual explanation of what the specific piece of metadata is about and what is to be provided as a value to that.

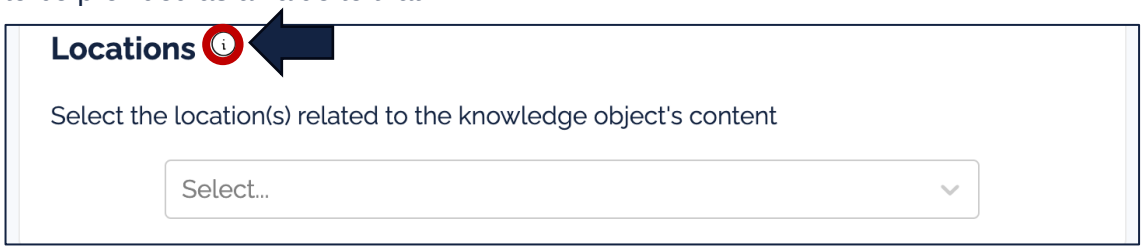

Figure 25: Info button on the right side of the title of each upload form section enabling access to a short explanation of the related piece of metadata and is expected as a value.

Before moving to the final step, an overview of the Knowledge Object metadata is made available with the help of a screen similar to the one shown in Figure 27 below. The page provides an overview of the digital file uploaded and the values provided to each of the Knowledge Object's metadata. By clicking the "Upload different file" link, there is potential to upload another file. By clicking the "Edit" link below each metadata label/section title, it is possible to change the value provided to the specific piece of metadata.

The Knowledge Object submission finishes by clicking the "Finalize Contribution" button at the bottom right corner of the screen.

Before making the submission of the Knowledge Object, it is possible to upload another one by clicking the "Add another Knowledge Object" button at the bottom of the screen. Doing so, will direct the contributor of the Knowledge Object in the beginning of Step 2. The "Add another Knowledge Object" is shown in Figure 26.

Figure 26: "Add another Knowledge Object" button.

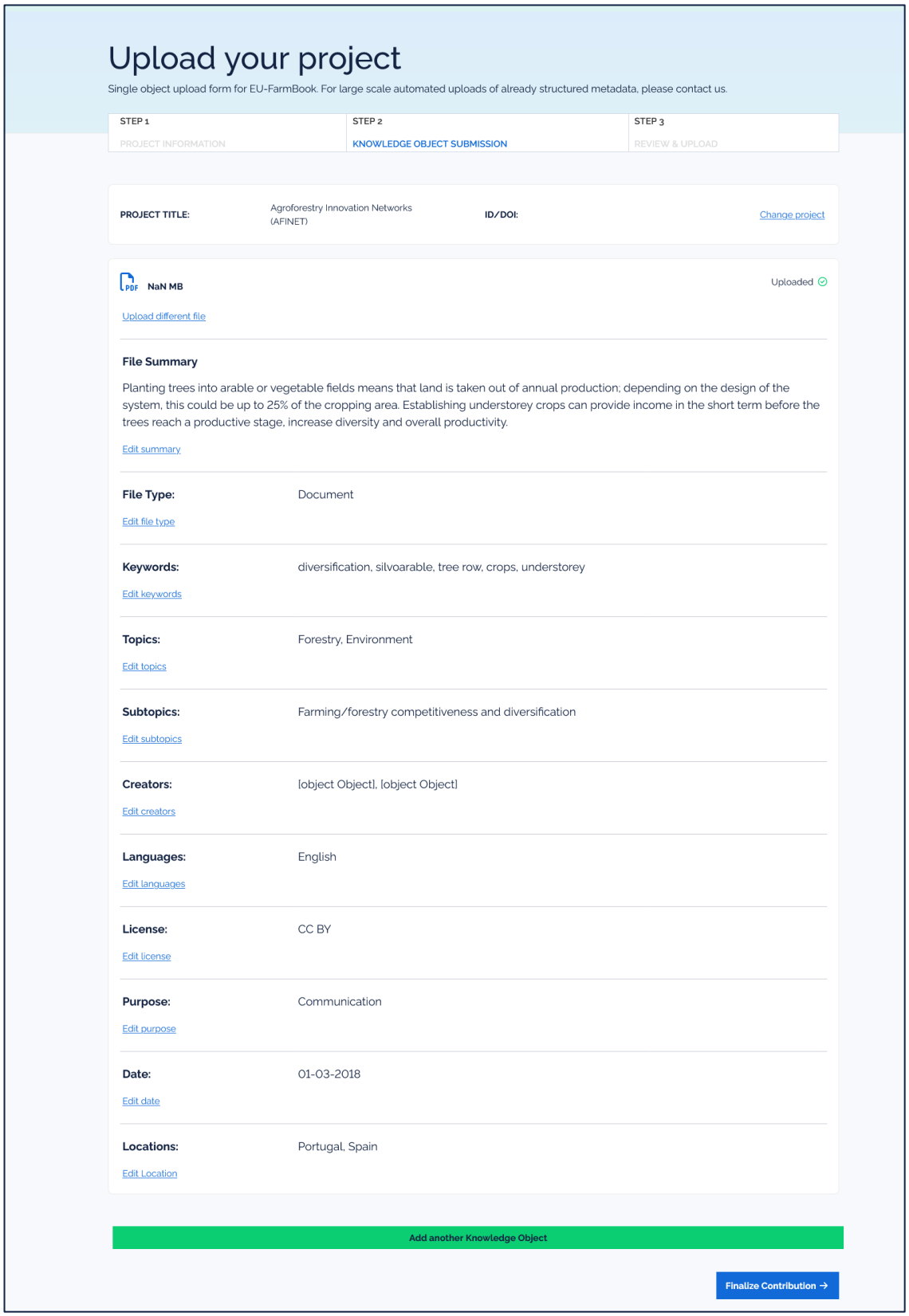

Figure 27: Metadata preview and editing (if needed) before proceeding to the submission of a Knowledge Object

4. STEP 3: Review & upload

In the final step, a final overview of the Knowledge Object(s) already uploaded[2] becomes available. In this preview (illustrated in Figure 28), part of the metadata of the Knowledge Object is displayed. All the Knowledge Object metadata already provided can be shown by clicking the “Show all +” button. The list of metadata can be collapsed by clicking the “Hide all -” button.

It is still possible to edit the Knowledge Object’s metadata by clicking the “Edit Knowledge Object ✎” button. The project information provided during the 1st step can also be edited by clicking the “Change project” link.

The Knowledge Object(s) are submitted by clicking the “Submit Contribution” button at the bottom right corner. With this action the upload process ends.

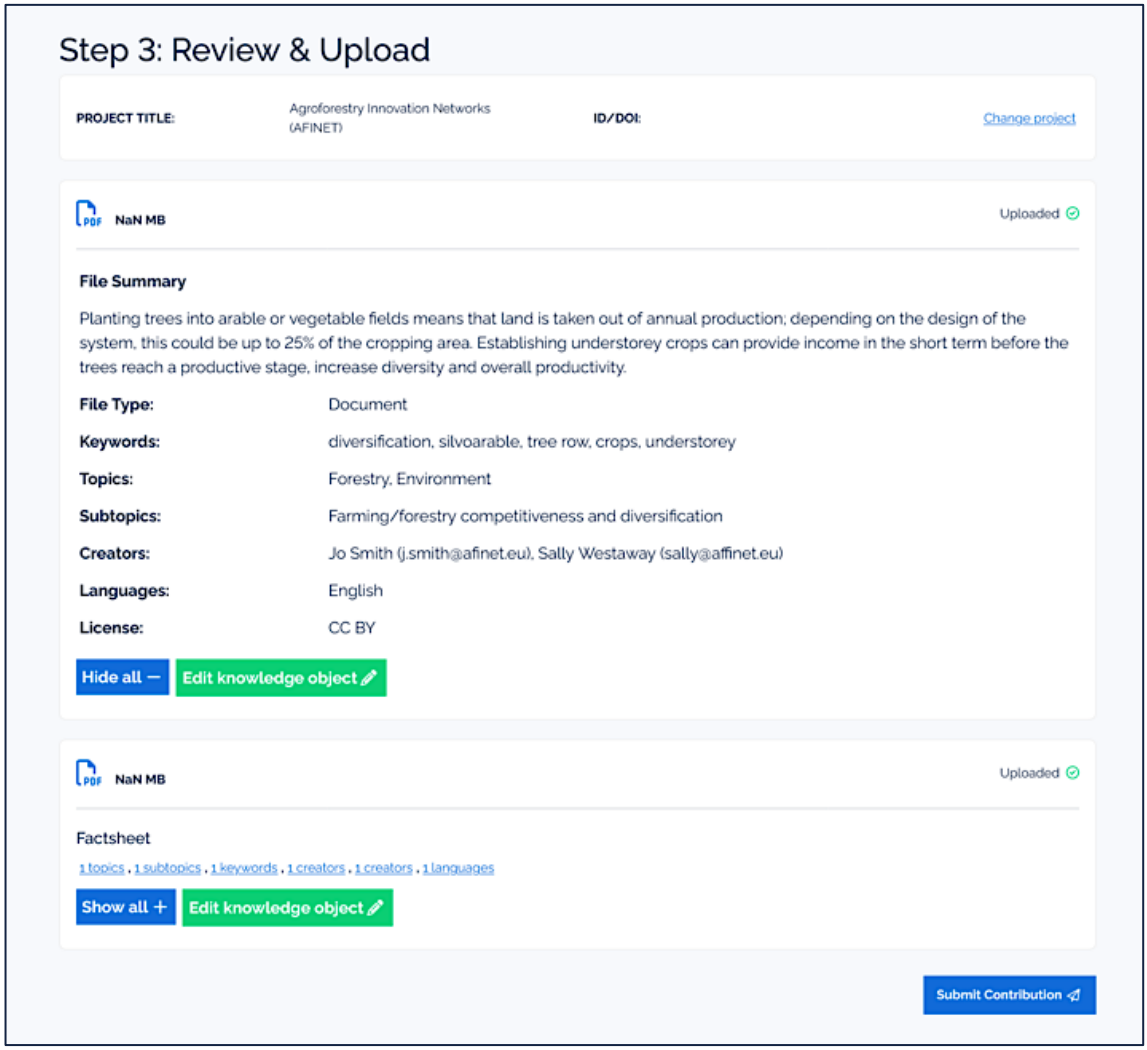

Figure 28: Final Knowledge Object overview before its submission and the end of the upload process.

[2] More than one Knowledge Objects can be uploaded, and their metadata can be added before submitting them to the EU-FarmBook platform.

5. Example use of the upload form

In this section, we provide an example of a Knowledge Object submission by using the upload form. The Knowledge Object is a factsheet from the AFINET Thematic Network. Given the steps at which the submission of a Knowledge Objects needs to take place by using the upload form, what needs to be done first is the addition of project information. To this end, the project acronym (i.e., "AFINET") is typed into the field "Find your project". Clicking the search button will return two projects as the result of the search for project information in CORDIS (see Figure 29). The search could have been made by using the full name of the project, the Grant Agreement ID, or its DOI.

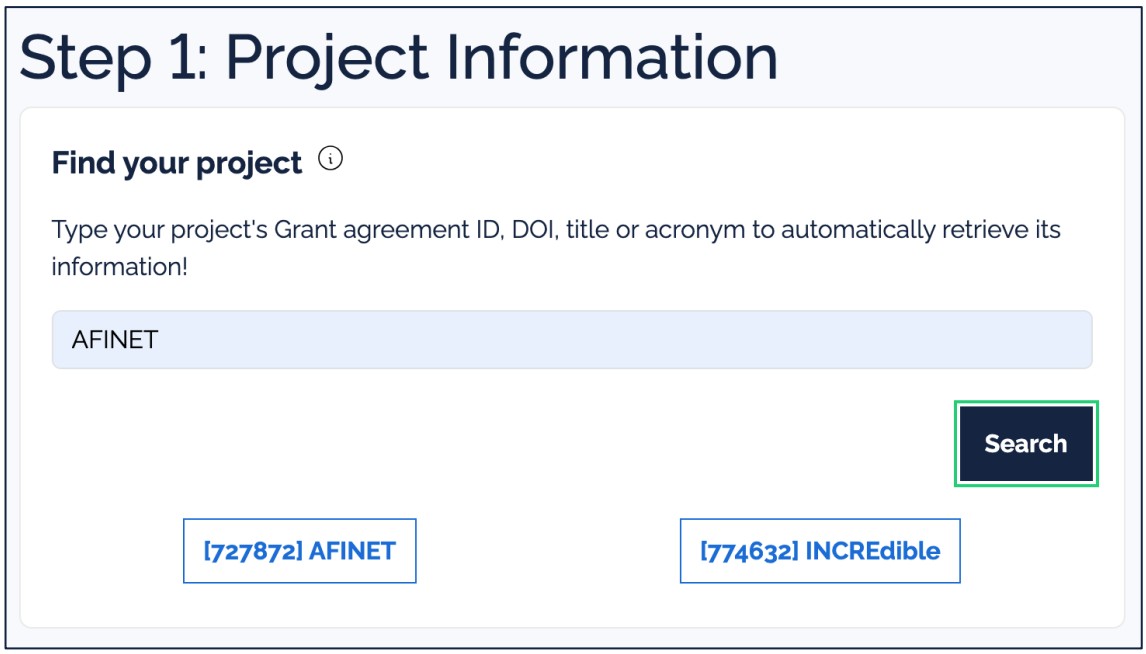

Figure 29: Searching for information for the AFINET project using the "Find your project" section of the upload form.

Clicking the box with the details for the AFINET project (bottom left corner in Figure 29) will result in having the project details automatically filled in in the rest of the upload form fields related to the 1st step of the Knowledge Object submission (see Figure 30).

The only piece of information that is not automatically filled in is the URL of the project's website. To have all the information provided and proceed to the next step, the project's website URL is manually added in the "Project Website" field of the form. The addition of the URL is shown in Figure 30 below.

A short summary of the Knowledge Object's content is the following: "*Planting trees into arable or vegetable fields means that land is taken out of annual production; depending on the design of the system, this could be up to 25% of the cropping area. Establishing understorey crops can provide income in the short term before the trees reach a productive stage, increase diversity and overall productivity*."

As shown in Figure 31, this short text is added in the "File Summary" field of the upload form.

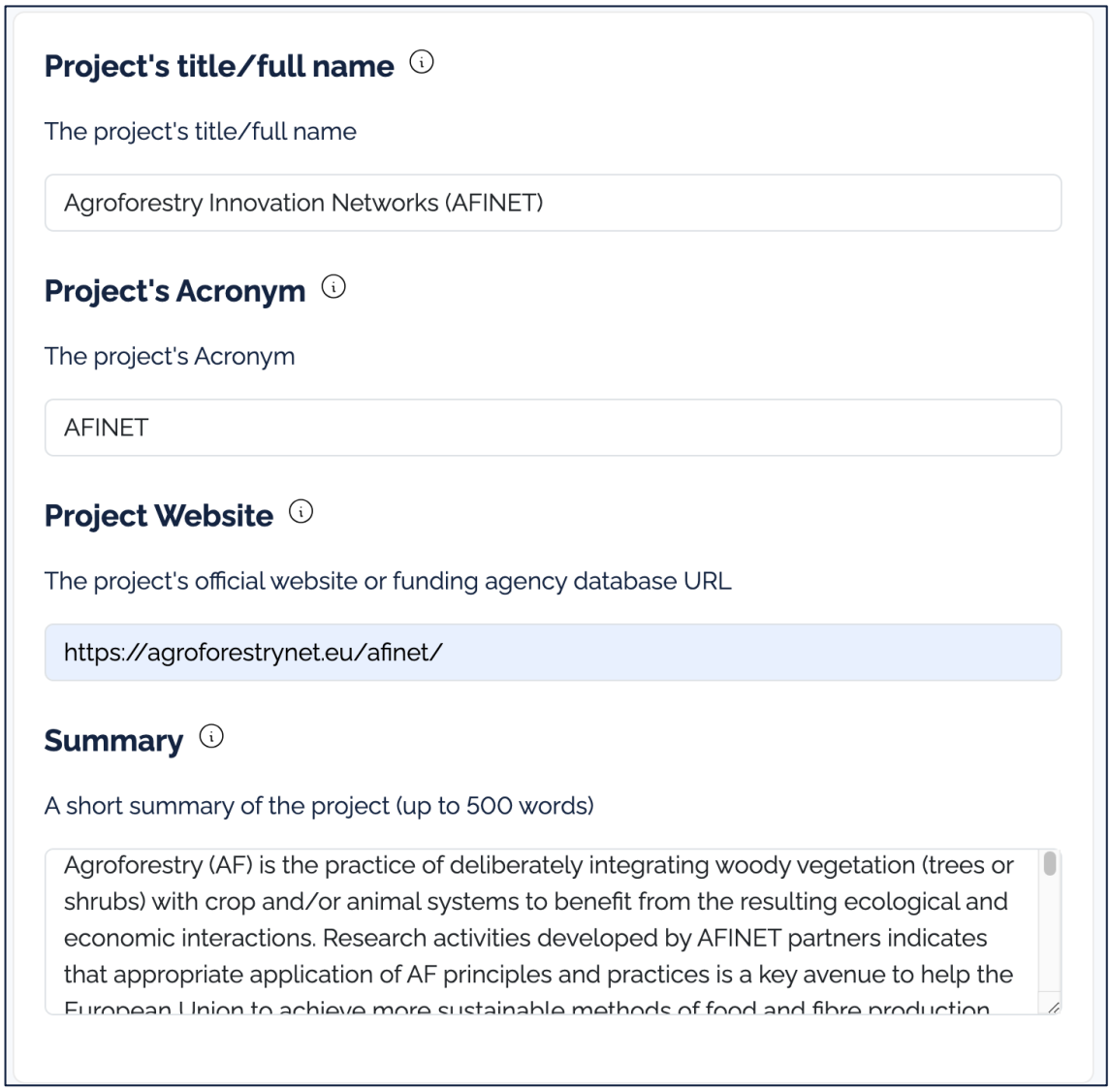

Figure 30: Details of the AFINET project added in the fields of the upload form related to the 1st step of the Knowledge Object submission.

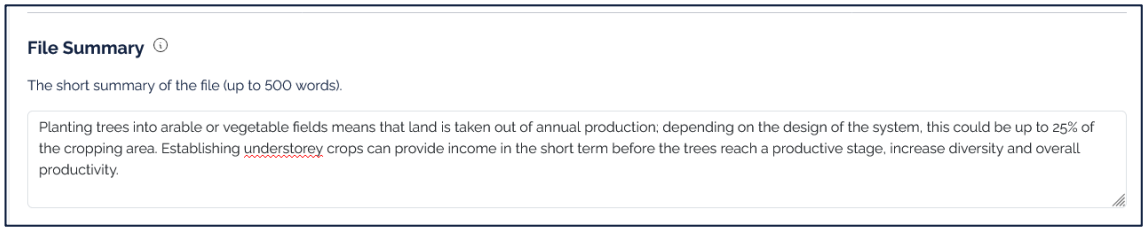

Figure 31: Short text summary of the Knowledge Object added in the “File Summary” field.

The Knowledge Object is a document; thus, the “Document” option is selected in the field “File Type” (see Figure 32).

Figure 32: The file type of the Knowledge Object is selected.

The Knowledge Object has a DOI. The DOI is retrieved from Zenodo, where all AFINET Knowledge Objects are available. As illusrated in Figure 33, the Knowledge Object's DOI is provided as value to the "Document Object Identifier" field.

Figure 33: The Knowledge Object's DOI is provided as a value to the "Document Object Identifier" field of the upload form.

The keywords associated with the Knowledge Object are: "diversification", "silvoarable", "tree row", "crops", and "understorey". As illustrated in Figure 34, these are the keywords provided in the "Keywords" field of the upload form. Commas are used to separate them from each other.

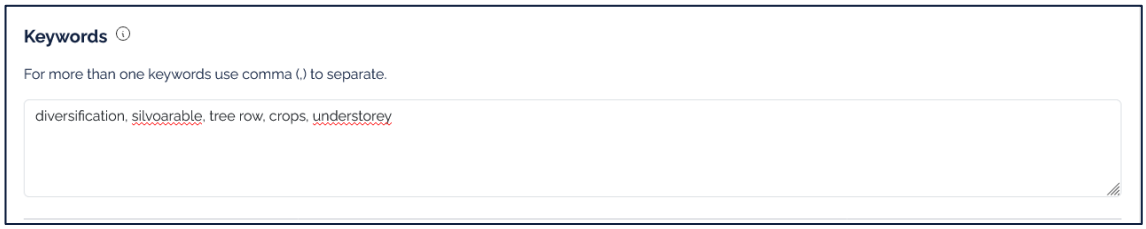

Figure 34: The Knowledge Object keywords added in the respective field of the upload form.

In our example, the topics of the Knowledge Object are "Forestry" and "Environment". The Knowledge Object's subtopic is "Farming/forestry competitiveness & diversification". The topic and subtopic selections are illustrated in Figures 35 and 36 below.

Figure 35: Selection of the topics of the Knowledge Object.

Figure 36: Selection of the subtopic of the Knowledge Object.

The creators of the Knowledge Object are Jo Smith and Sally Westaway. These are the names provided as values to the "Creators" field. The Knowledge Object creators' emails are fictitious and have been used for the sake of the example (see Figure 37).

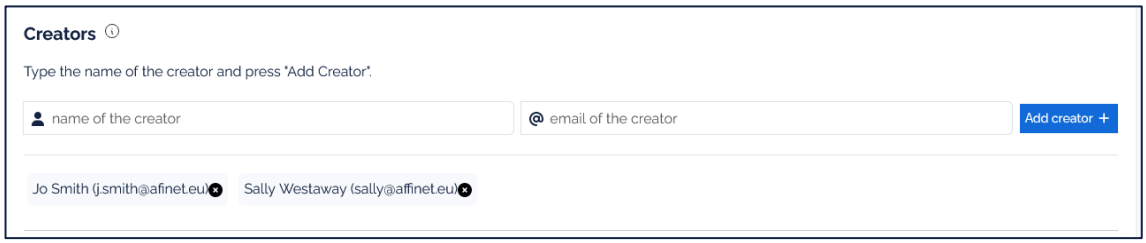

Figure 37: Names and email addresses of the Knowledge Object creators provided to the upload form.

The language in which the content of the Knowledge Object is available is English. This is indicated by the option “English” selected from the dropdown list of Knowledge Object languages, as shown in Figure 38.

Figure 38: Selection of the language of the Knowledge Object.

Next, we need to provide the license under which the Knowledge Object gets available.. In our example, the license is CC BY 4.0. This is the value provided to the “License” field of the upload form (see Figure 39).

Figure 39: Creative Commons license under which the Knowledge Object becomes available.

The Knowledge Object was created for communication purposes. As illustrated in Figure 40, this is the “intended purpose” option selected from the list of options in the respective field.

Figure 40: Identification of the Knowledge Object’s “Intended Purpose”.

The Knowledge Object was created on the 1st of March 2018. As shown in Figure 41, the value provided to the “Date of Completion” field is “01/03/2018” (the DD/MM/YYYY format is used to capture the Knowledge Object’s date of completion).

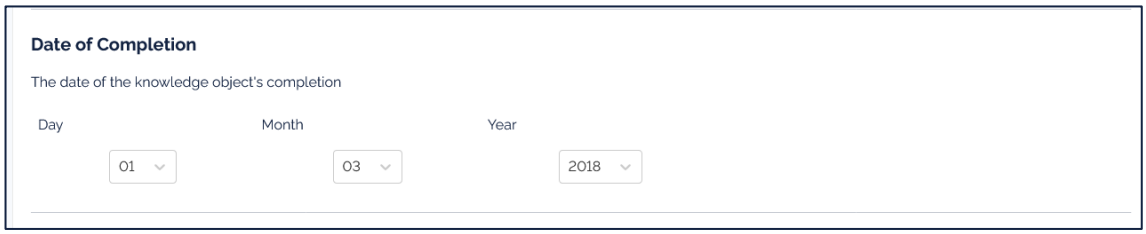

Figure 41: Date of completion of the Knowledge Object.

The Knowledge Object describes solutions related to crop diversification tested in Spain and Portugal (as made evident from the descriptions provided in the document). So, the names of these two countries are provided as values to the field “Locations” (see Figure 42).

Figure 42: Locations to which the content of the Knowledge Object relates.

The final preview of the Knowledge Object before its final submission is shown in Figure 44 below.

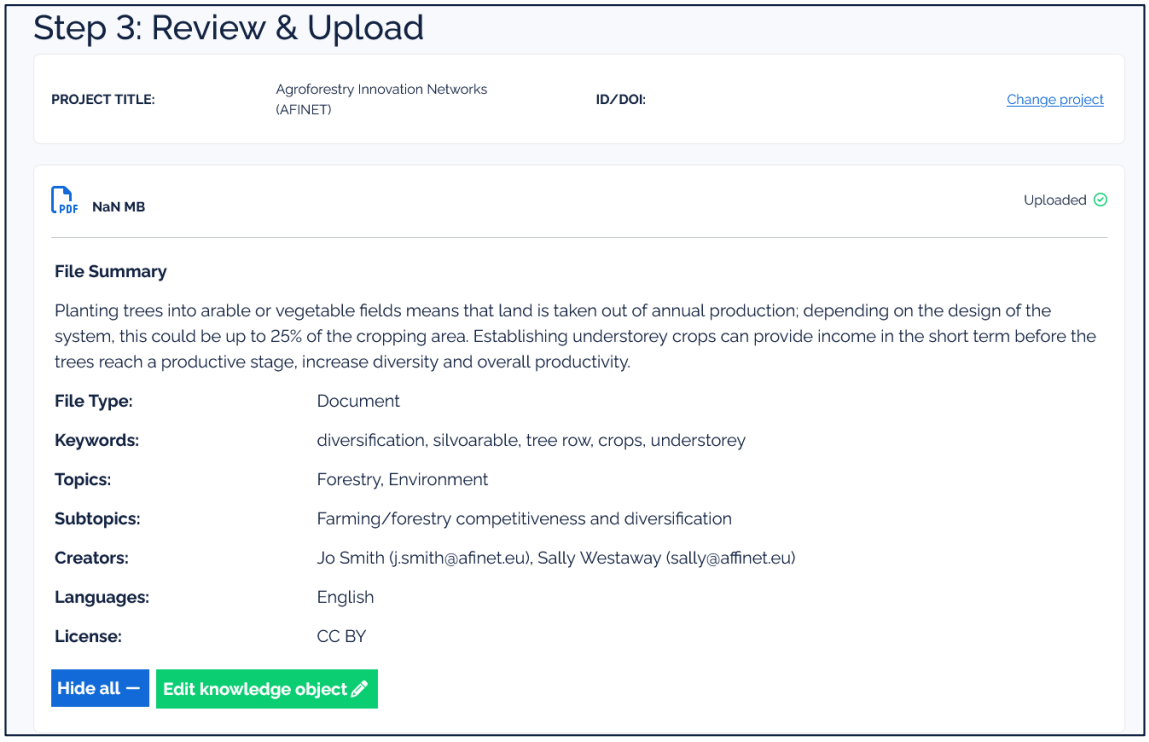

Figure 43: Knowledge Object preview before its final submission to the EU-FarmBook platform.