

# Sample & Data Request Management System User Guide

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## Manual Information

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## 1. JETSPEED Portal Log-in

The sample request form is used not only to request core samples but also to request any type of data even if you are not requesting core samples.

**Note:** If you are Macintosh user, you must download and install **Firefox** on your computer before using the login portal. Firefox is available at the following URL: <http://www.mozilla.com/en-US/firefox/all.html>. The same statement about Safari is included in the Request Management field once the user has logged in to the program.

### 1.1. SMCS User Checklist

A link to the submission checklist is provided under the Sample/Data Request field on the *My Requests* tab. The information provided in the checklist is discussed in Sections 1.2 and 1.3.

### 1.2 Registering

If you are using the Sample Request program for the first time, please create and enter a username and password and provide an e-mail address under **User Registration** (right field in Fig. 1) in the “Welcome to Sample Material Curation System.” The rest of the fields under User Registration are optional.

**Warning:** The change password procedure *sends the new password to the e-mail account you registered*. Be sure you have access to your registered email account before requesting a new password.

**Figure 1.** Welcome to Sample Material Curation System with Login Portal, Forgotten Password, and User Registration Fields.

The screenshot displays the IODP (Integrated Ocean Drilling Program) Sample Material Curation System interface. At the top left is the IODP logo. Below it, a blue banner reads "Welcome to Sample Material Curation System". A navigation bar contains "Top >> Welcome to Sample Material Curation System".

The interface is divided into three main sections:

- Login Portal:** Contains fields for "Username" and "Password", and a "Login" button.
- Forgotten Password:** Contains a text box for "email address" and a "Request New Password" button. The text above the field reads: "If you have forgotten your password, we can create a new one and send it to you via your email address. You must enter the exact same email address with which you originally registered."
- User Registration:** Contains a "Welcome, Please fill out the following form to become a registered user." message and a series of input fields: "username:", "email address:", "password:", "password (verify):", "department (optional)", "given name (optional)", "family name (optional)", "business postal name (optional)", "business street address (optional)", "business city (optional)", "business state (optional)", "business zip (optional)", "business country (optional)", and "business name (optional)". A "Register Me" button is at the bottom.

**Warning:** Your account is not complete until you fill in the required user information fields.

If you do not enter your contact (mailing) address, academic/professional affiliation, and phone number, you will need to provide this information when requesting samples and/or data.

**Note:** IODP Curators should create their own user account. An administrator will then authorize your account to access the system as a SMCster. See additional information in the Advanced User Guide.

### 1.3 Login

Once you are registered, enter your *Username* and *Password* at the **Login Portal** (upper left, Fig. 1).

**Warning:** If you are already registered in the system, please do not register again. If you don't know whether you already have a user ID, please contact the system administrator at [smcs@iodp.tamu.edu](mailto:smcs@iodp.tamu.edu).

The following items, which are in the User Checklist, are needed to complete the sample or data request made from the **My Request** tab:

- Shipping address (if different from mailing address)
- All co-requester names, e-mail addresses, affiliations, and research tasks for requests where you are the primary requester
- Particular DSDP/ODP Leg or IODP Expedition number and site number associated with your requested sample
- Summary of your research objectives (no more than 2000 characters)
  - Do not recreate your entire proposal text in this field.
  - If there is insufficient information in this field, however, the curator may return your sample request and ask for additional information.
- All files necessary to support your request. Recommended file formats are:
  - PDF
  - Microsoft Word
  - Microsoft Excel
  - TIF/JPEG
- Request number from a prior request, if your new request is related to an earlier request
  - You must enter your existing username and password to see the current status of your submitted requests.

**Figure 2.** Sample Request Tab Screen after Successful Login.



After a successful login, the portal displays the applications to which you have access (Fig. 2). Select **Sample Request** from the *Folders* Field.

## 2. Sample Request Application

**Warning:** The Jetspeed portal is not designed for one person to log in to two different requests at the same time. The portal cannot keep up with the two requests and the two screens become confused causing your sample request to be **altered**. See Section 3.1. for alternative suggestions on how to view more than one sample request.

After clicking on **Sample Request** in the *Folder* field, the program opens several user window tabs (Fig. 3) at the top of the screen, along with a *Request Management* box that provides information about using Firefox instead of Safari and lists helpful links

**Figure 3.** User Window Tabs.



Scientists will primarily use the following tabs to submit their sample request:

- **My Information:** edit personal and address information
- **My Requests:** create and manage sample requests

If the user is assigned to view or help manage sample requests, the user will be given access to these additional tabs:

- **View:** view and comment on assigned sample requests
- **Approve:** review, approve, request revision(s) to, or reject assigned sample requests
- **Edit:** manage assigned sample requests

Below the User Window tabs is a navigation line with the following links:

Home >> Sample Request >> Information.

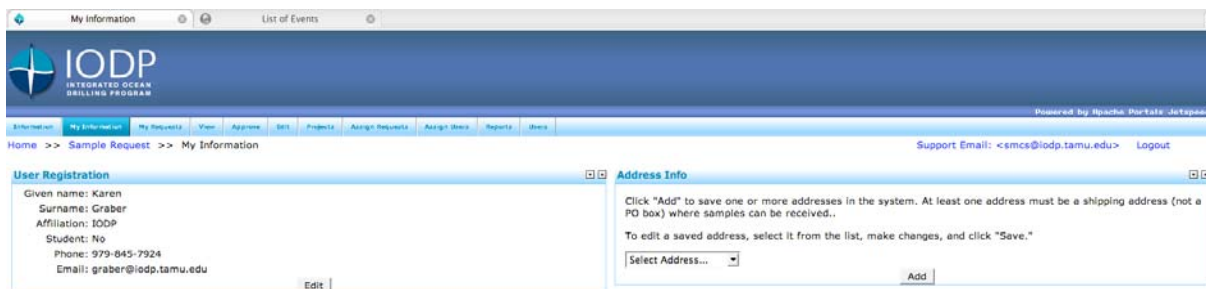
The last word in the link is the name of the active tab (i.e., *Information* in the sentence above).

A **Logout** link is located in the upper right hand side of any screen.

## 2.1. Edit Registration and Add New Address

To edit your registration information and add or change an address, select the **My Information** tab (Fig.4).

**Figure 4.** My Information Tab.



To edit your registration information:

1. Click the **Edit** button.
2. Change the information (name, affiliation, phone, or e-mail address).
3. Click **Save**.

To add a new address, go to the **Address Info** box (Fig. 4):

1. Click the **Add** button to create a new address.
2. Select **Add New Address** from the pull down list.
3. Enter the address information.
4. Click **Save**.

**Note:** Mandatory fields are marked with an asterisk (\*).

Once saved, the registration and mailing address are complete.

## ***2.2. Shipping Address***

If samples are to be shipped to addresses different than your mailing address, you will need to add the address(es) to your account by clicking on the **My Information** tab and selecting *Shipping Address* in the pull down box in the *Address Info* (Fig. 4) field. You edit shipping addresses the same way.

1. Click the **Add** button to create a shipping address (Fig. 5).
2. Select **Shipping Address** from the pull down menu.
3. Complete the address fields.
4. Click **Save** to save the information.

Address identifier examples: Airport, Laboratory, Shipping Dock, and Central Receiving.

The shipping address can be an airport. Include the airport name and terminal address.

**Figure 5.** Shipping Address Form

Address Info

Click "Add" to save one or more addresses in the system. At least one address must be a shipping address (not a PO box) where samples can be received..

To edit a saved address, select it from the list, make changes, and click "Save."

Shipping Address ▾

Address Identifier\*: Shipping Address

ATTN:

Address\*:

Address:

City\*:

State/Province\*:

Zip/Postal\*:

Country\*:

Save Delete

**Note:** Mandatory fields are marked with an asterisk (\*).

If needed, you can enter multiple shipping addresses in the address section of the **My Information** tab.

**Note:** Each address you enter must have a *different identifier*. The “Address Identifier” on the addresses is used to link an address to a sample in the sample template, allowing specific samples to be shipped to different locations. Please label your addresses carefully for ease of identification and accurate shipping.

**Note:** The label is used to link an address to a sample in the sample template, allowing specific samples to be shipped to different locations. Please label your addresses carefully for ease of identification and accurate shipping.

### 3. Online Submissions to IODP

Click on the **My Requests** tab (Fig. 6) to create a new request as well as check the status of all previously submitted requests.

#### 3.1. Viewing More Than One Sample Request

**Warning:** The Jetspeed portal is not designed for one person to log in to two different requests at the same time. The portal cannot keep up with the two requests and the two screens become confused.

If you need to look at two or more requests at the same time, you can:

1. Open one request in SMCS and the other in the original program used to create it, or
2. Copy one of the requests from SMCS into a word processing or spreadsheet application thereby allowing you to view one in SMCS and the other request in a different program.

**Figure 6.** My Requests Tab.



### ***3.2. Creating a New Sample Request***

Open the **My Requests** tab.

**Note:** If you have ever submitted a request to IODP, you will see the status of the request on the left under the *My Requests* field. To view one of those requests, click on the request number.

To create a new request, click on **Click to create a new request** in the *Sample/Data Request* field (right side of Fig. 6) and the online form opens (Fig. 7).



**Figure 7.** Create New Request Form

The screenshot shows a web browser window with the URL 'Home >> Sample Request >> My Requests'. The page title is 'Sample/Data Request'. The browser's address bar shows 'Support Email: <smcs@iodp.tamu.edu> Logout'. The page is divided into two main panels. The left panel, titled 'My Requests', shows a list of request statuses: Draft, Submitted, Revise, Approved, Rejected, Completed, and Retired, each with 'No records found'. Below this is a 'View Request Versions' section with a note: 'View a request by selecting a link above or to the left.' The right panel, titled 'Sample/Data Request', contains the form. It has a 'Request Information' section with a 'Save Draft' and 'Close' button. Below is the 'General Information' section with a 'Select request type' dropdown (set to 'Research'), a text field for 'Existing' (with an example '190, 311, 309/312'), and a dropdown for 'Future' (set to '314 LWD Transect'). There is also a 'Related Request Number' field. The 'Co-Requesters' section has a table with columns for 'Given name', 'Surname', 'Email', and 'Affiliation', and a 'Research task' field. Below the table is an 'Add' button. A note states: 'Co-Requester information cannot be edited. You can delete a Co-Requester after clicking "Save Draft".' The 'Project Objective' section has a text area for summarizing objectives.

The online form is broken into the following information sections:

- General Information
- Co-Requesters
- Project Objective
- Sample List
- Sample Handling Instructions
- IODP Onboard/Onshore Measurement Data Request
- General Comments

At the top and bottom of the entry fields are several buttons:

- **Save Draft:** (top and bottom of field) save the information you have entered so far; you can do this as often as you like.
- **Close:** (top and bottom of field) close request entry without saving any changes. You will lose any changes you have made since the last save.
- **Submit:** (bottom of field) send your request to the curators.

**Warning:** The request can be saved at any time by clicking the **Save Draft** button and can continue to be edited. However, once a request has been submitted, the user *cannot* alter it again unless the request is returned to you for revision by the curator or system administrator. If you need to correct your submitted request, please contact the appropriate curator or send an email to [smcs@iodp.tamu.edu](mailto:smcs@iodp.tamu.edu) for help.

### 3.2.1. General Information Field

In this field, you select the request type, specify the leg/expedition number, and provide a previous request number if the sample request is a continuation of a previous request.

**Figure 8.** General Information Field under the Sample/Data Request Field.

The screenshot shows a form titled "General Information". It contains the following elements:

- A dropdown menu labeled "Select request type:" with "Research" selected.
- Text: "Specify the leg/expedition number to request existing materials or the project to request future materials."
- Two radio buttons: "Existing:" (unselected) and "Future:" (selected).
- A text input field next to "Existing:" with a refresh icon and "(Example 190, 311, 305/312)" to its right.
- A dropdown menu next to "Future:" with "314 LWD Transect" selected.
- Text: "If this request is a continuation of a previous sample request, enter the previous request number. If this is a new request, just leave this field blank."
- A text input field labeled "Related Request Number:".

Select a request type from the pull down menu. There are four choices:

- Research: the most common option
- Education: teaching students
- Public Exhibition: museum loan
- Public Relations Event: booth at a scientific meeting

At this time, any expedition from 314 on is selected from the *Future* (planned) pull down menu. If the *Future* radio button to the left of the pull down menus is not clicked, the pull down menu will not work.

**Note:** To submit a continuation of a previous request, enter the previous request number as a reference for the curator in the box to the right of the text *Related Request Number*.

If you want to submit a request for **DSDP** Legs 1-96, **ODP** Legs 100-210 and **IODP** Expeditions 301, 303-312 use the Sample Request form at this URL: <http://iodp.tamu.edu/curation/samples.html>.

If you want to request data/samples for IODP Expeditions 302 and 313, use the MSP form at this URL: <http://www.iodp.org/access-data/>.

### 3.2.2. Co-Requesters Field

Enter all stakeholders in your research as co-requesters (Fig. 9). Co-requester's name, e-mail address, affiliation, and research tasks are all required information.

The **principal requester** is responsible for **all** obligations. The request can only be edited from the principle requester's account. If a co-requester has individual research objectives, the co-requester must submit their own original request.

**Note:** If the principal requester is a **student**, his/her advisor/supervisor must be added as a co-requester.

**Figure 9.** Co-Requestor Field in *My Requests* Tab.

Co-Requestors

List each person who will collaborate in this sample request (Co-Requestors).

Given name:

Surname:

Email:

Affiliation:

Research task:

Co-Requestor information cannot be edited. You can delete a Co-Requestor after clicking "Save Draft".

**Note:** A unique sample request number is assigned to the request after you click **Save Draft**. The request number will be listed under the “draft” section of the *My Requests* area.

### 3.2.2.1. Adding a Co-Requester

To add a co-requester, follow these steps:

1. Fill in the information fields (given name, surname, e-mail, affiliation, research task).
2. Click **Add**.
3. After adding all co-requesters, click **Save Draft** (remember the information is not actually saved on the request until you click **Save Draft**).

After clicking the **Add** button, the information just entered is listed at the bottom of the Co-Requestors Field.

### 3.2.2.2. Deleting a Co-Requester

To delete a co-requester, follow these steps:

1. Click the small delete box located beneath the co-requester’s information.
2. Click **Save Draft**.
3. If there is no delete box, click **Save Draft**, click on the delete box, and click **Save Draft** again.

### 3.3.3. Project Objective/Attach Files Field

This field allows you to:

- Summarize the purpose of the proposed research (limit of 2000 characters)
- Attach other files if they support the understanding of the research

Recommended file formats are PDF, Microsoft Word, Microsoft Excel, and TIF/JPEG.

To upload a file, use the browse and upload buttons in the *Project Objective* field (Fig. 10).

**Note:** If an **Excel sample list** is used it must be attached using the **Upload** button in the *Project Objective* field.

**Warning:** Do not use characters like “&” in the attached file name, because such files cannot be accessed by the curator or other administrative staff due to PC conventions.

Do not forget to click the **Save Draft** button at the bottom or top of the window to save your attached sample request after uploading the file.

A text field entitled *Description* above the *File* (browse) field allows you to provide a short summary of the file information attached.

**Figure 10.** Project Objective Field in *My Request* tab.

Project Objective  
Summarize research objectives below.

Characters remaining: 2000

Attach support documents

Do not upload files containing confidential information.

Description:

File:  Browse...

Upload

Description Filename Size Delete

### 3.3.4. Sample List Field and Sample List Editor

The Sample List Field contains brief explanatory text, five links to forms and examples, and a user editable box for estimated number of samples (Fig. 11).

**Note:** If you are requesting only IODP onboard/onshore measurement data for a scheduled (future) expedition, it is *not* necessary to provide a sample list.

**Figure 11.** Sample List Field in *My Request* Tab.

Sample List

Complete the sample list to specify samples, volumes, ages, features, or other parameters.

Click one of the links below to edit your sample list.

[Group Sample List](#) [Group Sample List Example](#)  
[Specific Sample List](#) [Specific Sample List Example](#)

Or download an EXCEL sample list template, fill it out, and upload it as a supporting document in the upload file area above.

[Click here to download Excel file.](#)

Estimated number of samples:

To fill out a sample list, perform these steps:

- Determine whether you need the Group or Specific Sample List (the Microsoft Excel template is only available for Specific Sample Lists) (see Sections 3.3.4.1. to 3.3.4.4.)
- Click on the **Group Sample List** or **Specific Sample List** links (Fig. 11) to open the *Sample List Editor* window
- **Or** for Specific Samples download a blank Microsoft Excel template by selecting **Click here to download Excel file** in the Sample List field (Fig. 11, red text).

### 3.3.4.1. Definition of the Sample List Editor Row Column Headers

Definitions of the row column headers (e.g., Exp/Leg, Particular Sampling Position Top [cm], Sample Volume, etc.) for the *Group* and *Specific Sample List* online forms are found at the following URLs:

Group Sample List Column Header Descriptions are available at:

[http://millstone.iodp.tamu.edu/wiki/index.php/SDRM\\_column\\_descriptions\\_group](http://millstone.iodp.tamu.edu/wiki/index.php/SDRM_column_descriptions_group)

Specific Sample List Column Header Descriptions are available at:

[http://millstone.iodp.tamu.edu/wiki/index.php/SDRM\\_column\\_descriptions\\_specific](http://millstone.iodp.tamu.edu/wiki/index.php/SDRM_column_descriptions_specific)

**Table 1.** Comparison of Group and Specific Sample List Column Headers

Group Sample Column Header	Specific Sample Column Header
Leg/Exp	Exp/Leg
Site	Site
Hole	Hole
Sample Type	Core
Parent Sample Type	Section
Sample Volume (cm <sup>3</sup> )	Half (W/A)
Lithologic Feature	Particular Sampling Position Top (cm)
Sampling Tool	Particular Sampling Position Bottom (cm)
Geologic Age Young (Ma)	Sample Location Flexibility (cm)
Geologic Age Old (Ma)	Piece Number

Geologic Age Interval (kyr)	Sample Volume (cm3)
Depth Type	Parent Sample Type
Depth Interval Top (m)	Sampling Tool
Depth Interval Bottom (m)	Shipping Address
Sampling Depth Interval (cm)	Observable Method Tool (OMT)
Other Resolution (e.g., 1 per core)	
Shipping Address	
Sample Location Flexibility (cm)	
Observable Method Tool (OMT)	

### 3.3.4.2. Sample Types (Group Samples)

*Sample Types* (another column title) are defined at the following URL:

[http://millstone.iodp.tamu.edu/wiki/index.php/USIO\\_sample\\_types](http://millstone.iodp.tamu.edu/wiki/index.php/USIO_sample_types)

### 3.3.4.3. Group Sample List: Best for Future Expeditions

For requests of samples from a future (scheduled) expedition, a Group Sample List is usually more appropriate. This type of list allows the requester to summarize large number of samples in single-line requests with a set of parameters. An Excel template is not available for Group Sample Lists because a few lines will usually suffice to specify the request even for large numbers of samples.

Clicking on the **Group Sample List** (Fig. 11) link opens a new window called *Sample List Editor* (Fig. 12).

**Figure 12.** Group Sample List Editor Window

An example of a completed Group Sample List request form can be viewed using this link: [http://millstone.iodp.tamu.edu/wiki/index.php/SDRM\\_group\\_sample\\_list\\_expl](http://millstone.iodp.tamu.edu/wiki/index.php/SDRM_group_sample_list_expl)

#### 3.3.4.4. Specific Sample List: Best for Past Expeditions

For requests of samples from past expeditions, a Specific Sample List is usually more appropriate. This type of list requires the requester to specify each (existing) single sample, one per line. This is obviously only possible for existing material. An Excel template is available for Specific Sample Lists in addition to the web form because it may be more convenient to list large numbers of samples. Clicking on the Excel file link in the Sample List Field downloads the Excel template.

An example of a completed Specific Sample List request form can be viewed using this link: [http://millstone.iodp.tamu.edu/wiki/index.php/SDRM\\_specific\\_sample\\_list\\_expl](http://millstone.iodp.tamu.edu/wiki/index.php/SDRM_specific_sample_list_expl)

#### 3.3.4.5. Observables/Methods/Tools (OMT) Sets

Create OMT sets to be used in the research by highlighting one or more items from each of the Observables, Methods, and Tools list and then clicking the **Add** button below Observables. Multiple selections can be made in each list using **CTRL** and **SHIFT** (MAC: **apple command key**). Enter the OMT set number(s) (e.g., OMT Set #2) you created in this step into the OMT box in the row(s) at the top of the Sample List Editor (see *Group* and *Specific Sample List Example* links in the Sample List field).

**QUERIES:** How do you delete an OMT Set? Do you have to have one item from each of the three boxes? If you don't have to have one from each box, how do you remove an item highlighted? When do you hit the save button?

#### 3.3.4.6. Estimated Number of Samples

At the bottom of the Sample List is a box where you type in the number of estimated samples you are requesting.

#### 3.3.4.7. Sampling Tools

A list of typical sampling tools employed by IODP is available at the following URL: [http://millstone.iodp.tamu.edu/wiki/index.php/USIO\\_sample\\_tools](http://millstone.iodp.tamu.edu/wiki/index.php/USIO_sample_tools)

#### 3.3.4.8. Sample Volume

A list of typically requested sample volumes from scientific drilling cores is available at: [http://millstone.iodp.tamu.edu/wiki/index.php/USIO\\_sample\\_volumes](http://millstone.iodp.tamu.edu/wiki/index.php/USIO_sample_volumes)

#### 3.3.5. Sample Handling Instructions Field

Add any special handling instructions in this text box. The maximum number of characters is 1000.

#### 3.3.6. Measurement Data Request Field

Specify shipboard data you plan to use in the research to assist the expedition management in their science planning. Highlight a measurement and then click the *right arrow button* to add the measurement to the *My Measurements* field.

If you would like to conduct specific measurements during the cruise, describe them fully in the Project Objective field (attach files as necessary).

### 3.3.7. General Comments Field

You can provide extra information related to your sample/data request in this box. Viewers and Approvers may use this box to provide comments as well.

**Example Comment:** Samples may be taken from Hole 1054A or 1054C; however, all of the samples need to be taken from the same hole.

### 3.3.8. Save Sample Request

You can save a request at any time without submitting by clicking the **Save Draft** button located at the top and bottom of the *My Requests* window. Later, you can resume your work and submit the form when it is complete. Once you submit a request, you can no longer edit it.

### 3.3.9. Submit Sample Request

Submit the request for review by clicking on the **Submit** button at the bottom of the *My Request* window. After successful submission, you will see the submitted request number under the *Submitted* field at the left side of the *My Requests* window. Once you submit a request, you can no longer edit it. Write to the Curator, Staff Scientist, or [smcs@iodp.tamu.edu](mailto:smcs@iodp.tamu.edu) for assistance.

A confirmation e-mail that includes your request number will be sent to your registered e-mail address.

## 4. Request Status and Revision Submission

After successful submission, your request will be forwarded to the appropriate IODP staff for review and processing. The status of all your requests is shown on the left side of the *My Requests* tab.

### 4.1. Submit a Revision

If your request has to be revised, it will appear in the *Revise* field (left side of the *My Requests* tab). Select the request number in the *Revise* field, click **Edit** at the top or foot of the window and then edit the request according to the comments submitted by the approver or viewer.

**Note:** Your revised request will receive a new version number when resubmission is completed.

Remember that the modified information is not actually saved on the request until you click **Save Draft** at the top or bottom of the window.

Resubmit the modified request for review. You will receive a confirmation e-mail if your submission is successful.



## 5. View Tab

The **View** tab will show requests to which you are assigned “viewer” privileges (i.e., sample requests from other science party members). You can make comments in the *Comments* field on any requests for which you have viewer privileges.

### 5.1. Make Comment on a Request as a Viewer

To make a comment on a request, do the following:

1. Select a request number from the list placed on the left of the window.
2. Click **Edit** to create new comment.
3. Enter a comment into the *Viewer* box.
4. Click **Save** to save your comment.

## 6. Review and Approve Request

The *Approve* tab only shows requests for which you are assigned “Approver” privileges (e.g., expedition Co-Chief Scientists, Curator). From this tab, you can review and comment on a request for which you have approver privileges.

### 6.1. Make Comment on a Request as an Approver

To make a comment on a request, do the following:

1. Select a request number.
2. Click **Edit** to create a new comment.
3. Enter a comment into the *Approver* text box
4. Click **Save** to save your comment

### 6.2. Approval Status of Request

If you have approver privileges, click **Approve**, **Reject**, or **Revise** in the *Approval Status* box at the top of the *Approve* window.

## 7. User Support

Send e-mail to [smcs@iodp.tamu.edu](mailto:smcs@iodp.tamu.edu) to report problems or request changes to this application.