Guidelines to upload documents on the European Geothermal RD&I Document Search Engine EGRISE

These instructions are for ETIP-DG members who want to contribute to the European Geothermal RD&I Document Search Engine (EGRISE)[1]. To this aim, the documents should be correctly uploaded and described with metadata on EGRISE's *backend*, which is the Zenodo Repository.

1. General Instructions

In Zenodo all the fields with the red asterisk are **mandatory**.

1. Go to the URL: http://zenodo.org
2. Login with your own Zenodo **user name** and **password** (or register and then login in case you are not yet registered)
3. Click on '**Upload'** (on the top menu near the search text box)
4. Click on '**New upload**' (green button on top right)
5. In 'Files' frame drag and drop the pdf of the document or click on '**Choose file**' to browse your computer and select the pdf file to upload. Then click on '**Start upload**' on top right of the 'Files' frame. When the upload is complete you will see the size of the file and the "Progress" will be signalled with a ✔
6. **The following is the most important step**: In the 'Communities' frame start writing 'Geothermal' and it appears '**Deep Geothermal**'. Choose 'Deep Geothermal'
7. In 'Upload type' choose the correct typology referred to the uploaded file ("Publication" by default), then define the '**Publication type**' (e.g., Project deliverable, Report, …)
8. If the document already has a **DOI**, insert the existing DOI code in the 'Digital Object Identifier', otherwise leave it blank. In this latter case Zenodo will assign a new DOI to the document.
9. In '**Publication date**' insert the date of the document delivery (publication)
10. In '**Title**', insert the document title
11. In '**Authors**', insert the family name comma given name, the affiliation and, if known, the ORCID code. In case of more than one author, click on '+ Add another author', and fill the three fields. If the affiliation is not clear leave the field blank. In case the author/s is/ are not declared in the document, use the name of the project
12. In '**Description**' you should provide a description of the document (free text). The abstract or the executive summary, if it exists, of the document should be used. In case these are not available please describe the document in few lines. Pay attention when you copy+paste a

text, since some line might wrap and should be corrected. The text has to be correctly formatted

13. In '**Version**' insert the code of the document version. If the code is not available, use the value 1.

14. '**Language**' has to be English. If you type 'eng' the complete '**English**' word appears and can be chosen.

15. The '**Keyword**' field is a very important: Please follow carefully the dedicated instruction provided in Section 2.

16. The '**Additional note**' field is crucial as well. If the document refers to a project **NOT** funded under FP7 or H2020 program, provide here the name of the project and the funding programme in this way: *name of project – funding program* (e.g., DARLINGe – Interreg Danube Transnational Programme). The project has to be inserted as Acronym then space then minus then space then the name of the funding programme. If the document refers to a project funded under FP7 or H2020, leave this field empty

17. In '**Access right**' choose the 'Open Access' if documents are freely accessible, 'Embargoed Access' if documents will be available by a certain date, 'Restricted Access' if documents are available under specific conditions or 'Closed Access' if the documents are not accessible. Consider that in all 4 cases the metadata will be available for the documents.

18. If the '**Licence**' is specified in the document, it should be chosen in the list that appears when you start to type in the dedicated text box. If the licence of the document is not declared, type 'not' and 'Licence Not Specified' will appear and have to be clicked

19. Next metadata frame is '**Funding**'. If the document belongs to a FP7 or H2020 project, use the default value '**European Commission (EU)**' in the '**Grants**' left field and type the name of the project in the right field: a list of projects is already inserted, choose the correct one. If the document belongs to a project **NOT** funded under FP7 or H2020 delete the 'Grants' fields by clicking on the 'x' on the right of the second text box

20. If indicated in the first pages of the document, please insert '**Contributors**' as described at point 11, also selecting in the right field the contributor's role (e.g., contact person, data collector, data curator, editor, …)

21. If existing, please insert the '**References**' available in the document by copy+paste in the specific field, one reference per field and using 'Add another reference' till the last item

22. In case the document refers to a 'Journal', 'Conference', Book/Report/Chapter', 'Thesis', 'Subject' please complete the description in the proper field

23. '**Save'** your metadata by clicking on the button at the bottom right of the page and check your work. When you are sure that your description is correct click on '**Publish'.** During the description of the document it is recommended to save often, to avoid loss of information

The document you insert should appear in the EGRISE's *frontend* (i.e. in the ETIP-DG website) from the day following your metadata publication.

2. Specific instruction to insert Keywords (point 15)

It is mandatory to insert

- all the required keywords as described below
- only one keyword per keyword field, using 'Add another keyword' to insert new keywords
- each keyword in lowercase and without special characters (e.g., -, ...) among the words

<u>Insert</u>:

1. geothermal energy
2. **at least one** <u>of the following categories</u>[2]:
    a. exploration
    b. drilling
    c. production
    d. surface systems / generation
    e. non technical
    f. environmental
3. if the category is 'exploration' choose **at least one** topic among: geochemistry, geophysics, structural geology, hydrogeology, geochronology, volcanology (multiple topics are allowed)
4. if the category is 'non technical' choose **at least one** topic among: social aspects, codes & definitions, energy sector status, skills education & training, research roadmaps, regulatory aspects, economics, financing (multiple topics are allowed)
5. name of the location if the document is referred to a particular place
6. country if the document is referred to a particular nation

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[2] These categories correspond to the ETIP-DG Working Group (WG) titles