



OTN Metadata and Data Policy Highlights

OTN's data procedures and policies have, from the inception of the platform, been aligned with international standards and best practices and designed to meet the conditions of national and international funding agencies. In order to remain current, OTN must periodically review its data management, and update procedures and policies to meet evolving national and international standards and practices.

OTN's 2008 data policy was modeled on the international standards presented in OECD's 2006 Principles and Guidelines for Access to Research Data. Much has changed since 2008, especially with regards to the evolution of national and international standards for data sharing. In 2011 the Canadian Research Data Summit resulted in a unified position of Canadian funding agencies—including OTN's principal funding agencies CFI, NSERC, and SSHRC—to require that all data from publically funded research be made openly available in a timely manner. Meeting this standard will be a condition for all grantees to maintain funding from these agencies. It is anticipated that this standard will be implemented at some point within the next year. However, it is also anticipated that there may be exceptions provided in some circumstances to the policy that permit investigators to restrict access to data for limited periods. Examples from the OTN context could include not reporting location information on endangered species that network investigators are tracking to protect the animals from illegal harvesting, and protecting the thesis data for Highly Qualified Personnel who are in training.

Rapid growth in the OTN network and in the demand for OTN data services have greatly increased the volume of data collected. This requires the consideration of automation of data harvesting and the efficiency of automated data posting. Restricting access to data in these circumstances, as is presently done for limited periods for certain categories of OTN data, becomes problematic and expensive.

The assurance of Quality Assessment/Quality Control (QA/QC) for the global data feeding into the OTN requires the creation/operation of regional nodes. In order to provide guidance to the development of these regional data centers, OTN's data services, procedures, and policies must be kept current.

In the face of these changes, the OTN is now proposing a series of modifications to its current data policy. These are:

1. Publicly funded (e.g. OTNGlobal or OTNCanada work supported by CFI, NSERC, SSHRC, and Dalhousie funding) deployment, tracking and data collaborators must accept the terms of the most current OTN data policy and provide in a timely fashion all required metadata and data forms to the OTN Data Centre (OTNDC). Collaborators who purchase instruments from VEMCO must also send both VEMCO and OTNDC a VEMCO equipment authorization form so that VEMCO may provide instrument, particularly tag specifications and metadata, directly to the OTNDC. If trackers are using another equipment or tag manufacturer, please contact the OTNDC.
2. OTNDC provides free and open access to all discovery, deployment, and release metadata, as well as detection data to scientists and members of the public who register to use it via the [OTN website](#). Exceptions to this rule are:
 - a. Tag IDs where OTNDC has received manufacturers' and trackers' metadata will be subjected to a two-year renewable embargo (two years after tag life expiration)
 - b. Where the OTN project coordinator has received proof of a scientific license for work on endangered species, release metadata and tag IDs will be subjected to a maximum ten-year renewable embargo*

*Embargoed data can be obtained by contacting the principal investigator, or the embargo can be shortened at the request of the investigator
3. Metadata reports and tag detection histories (tracks and/or detections) will be sent via email to owners of identified tags whenever they are detected as part of routine processing by OTNDC. Real-time and or near real-time deployment operators (e.g. buoys, gliders) may submit detections to OTNDC and so trigger similar notification.

4. If a regional node (e.g. NEPacific, SAfrica = WIndian + SEAtlantic, Australia = EIndian + SWPacific, GLFC) is required, then the node operator(s) must:
 - a. Provide their own data storage equipment and use a remotely managed copy of the Dalhousie based software system (Red Hat Package Manager), or alternatively use a virtual system in the Dalhousie Computer Center
 - b. Identify the regional data administrator who provides local QA/QC and coordinates/collaborates with the OTNDC staff
 - c. Enable the timely extraction and rollup of data in the regional node by OTN Global initiated data processing procedures

5. By accessing or using OTN Data, all users agree to:
 - a. Give proper attribution to all data providers and to OTN using the preformed citations contained in OTN metadata reports and data records
 - b. Inform [OTN](#) of publications, data products (e.g tables, graphs, maps, etc.), and commercial applications resulting from use of the OTN data
 - c. Acknowledge that neither OTN nor the provider is liable for inaccuracies in the data
 - d. Assume responsibility for investigating and understanding any limitations of the data
 - e. Report all problems with respect to data to otndc@dal.ca

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