

Introduction to OSF: A Hands-on Guide

PDF version of this document: <https://osf.io/wm8vs>

OSF: <https://osf.io/>

Related webinar series:

Contact OSF: support@osf.io

Center for Open Science: <https://www.cos.io/>

Table of Contents

1. [What is the OSF?](#)
2. [Sign up for an OSF Account](#)
3. [Your OSF Profile](#)
4. [Discover OSF content](#)
5. [Research planning with OSF Registries](#)
6. [Study management and collaboration with OSF Projects](#)
7. [Research sharing with OSF Preprints](#)
8. [Create relationships across OSF content](#)
9. [Accessing my OSF content](#)
10. [Start using OSF](#)

1. What is the OSF?

a. [Support across the research lifecycle](#)

- i. A free, open source online research platform, designed to support researchers to openly, and transparently share their work at all stages of the research lifecycle.



Search and Discover

Find papers, data, and materials to inspire your next research project. Search public projects to build on the work of others and find new collaborators.



Design Your Study

Start a project and add collaborators, giving them access to protocols and other research materials. Built-in version control tracks the evolution of your study.



Collect and Analyze Data

Store data, code, and other materials in OSF Storage, or connect your Dropbox or other third-party account. Every file gets a unique, persistent URL for citing and sharing.



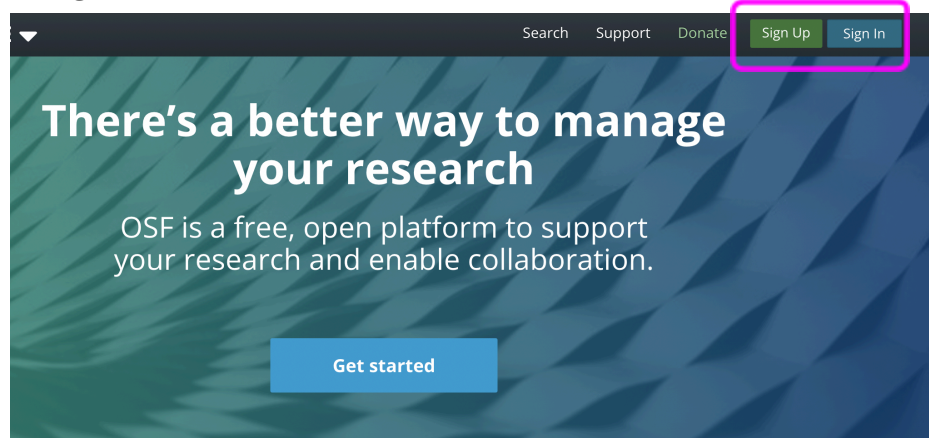
Publish Your Reports

Share papers in OSF Preprints or a community-based preprint provider, so others can find and cite your work. Track impact with metrics like downloads and view counts.

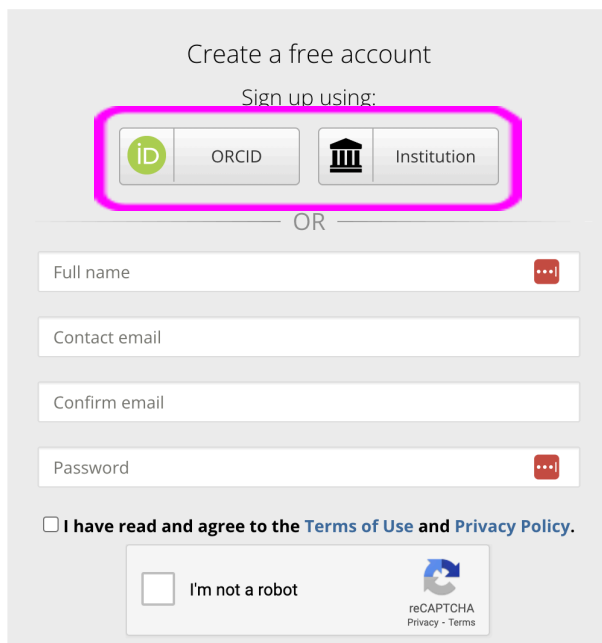
b. [Read more about the OSF](#)

2. Sign up for an OSF Account

- a. [Create an OSF account](#)
- b. How to find the sign up page (when not logged in)
 - i. [Link](#)
 - ii. Navigate [see below]



- c. [Sign in with your ORCID credentials](#) (see below)
- d. [Sign in with your institutional credentials](#) (see below)

A screenshot of the OSF account creation form. The title is 'Create a free account'. Below it is the text 'Sign up using:'. This section is highlighted with a pink rectangular box and contains three buttons: 'iD' (with an ORCID icon), 'ORCID', and 'Institution' (with a building icon). Below this is the word 'OR' in a larger font. The form includes input fields for 'Full name', 'Contact email', 'Confirm email', and 'Password'. At the bottom, there is a checkbox for 'I have read and agree to the Terms of Use and Privacy Policy.' and a reCAPTCHA widget with the text 'I'm not a robot'.

- e. [Sign into your OSF account \(when registered\)](#)
- f. [What is OSF Institutions?](#)

3. Your OSF Profile

- a. Getting to your OSF profile
 - i. [Link](#) (if you are logged in)
 - ii. Navigate (see below)

OSFHOME ▾ My Projects Search Support Donate Eric L Olson ▾

Eric L Olson

Member Since 2019-12-20
Public Profile osf.io/tx3fb

6811 activity points
244 projects, 131 public

Social	Employment	Education
	ORCID	0000-0002-5989-8244
	Twitter	olsonscholcomm
	GitHub	eolson3
	LinkedIn	ericolson

Public projects

- [OSF Collections](#)
Butler, Olson, Oertelt & 2 more
- [Supplemental materials for preprint: test](#)

Public components

- [Helpful Resources](#)
Member Resources / [Helpful Resources](#)
Butler, Pfeiffer, Staller & 7 more

- b. [More information about your OSF Profile](#)
- c. [More information about notification preferences](#)

4. Discover OSF content

a. Search

i. [Getting to OSF Search](#)

1. [Link](#)
2. Navigate (see below)

The screenshot shows the OSFHOME search interface. At the top, there is a navigation bar with 'OSFHOME', 'My Projects', 'Search' (highlighted with a pink box), 'Support', 'Donate', and a user profile for 'Eric L Olson'. Below the navigation bar is a search bar with the text 'Search OSF' and a placeholder 'Enter search term(s) here'. The search results are displayed in a grid format. On the left, there is a 'Refine' sidebar with '10,000+ results' and various filter categories: Date created, Funder, Subject, License, Resource type, Institution, and Provider. The main search results area shows two items: a 'FILE' titled 'GA_MMN_Difference_Wave_All_Channels.pdf' by Jaclyn Farrens, Steven J. Luck, Andrew X Stewart, Wendy Zhang, and Emily S. Kappenman, and a 'PROJECT COMPONENT' titled 'Methods and Measures' by Jon Grahe and Nichole Clifford. The 'Search' button in the navigation bar is highlighted with a pink box.

b. [Filter](#) (see below)

The screenshot shows the 'Refine' sidebar from the OSF search interface. The 'Funder' filter is expanded, showing a list of funding organizations and their corresponding result counts. The list is highlighted with a pink rounded rectangle. The organizations and their counts are: National Institutes of Health (21), Economic and Social Research Council (21), Narodowe Centrum Nauki (21), Schweizerischer Nationalfonds zur För... (17), Nederlandse Organisatie voor Wetens... (14), European Research Council (12), Conselho Nacional de Desenvolvement... (12), H2020 Marie Skłodowska-Curie Actions (10), and Social Sciences and Humanities Resear... (10). Below the list is a 'See more' link. Other filter categories visible in the sidebar include Date created, Subject, License, and Resource type.

c. Keep your constructed query (see below)

OSFHOME

My Projects Search Support Donate Eric L Olson

Search OSF

Enter search term(s) here

30 results

Refine

Funder: National Science Foundation

Date created

Funder

Subject

License

All Projects Registrations Preprints Files Users Relevance

PROJECT

Supplement: Ediacaran-Ordovician tectonic and geodynamic drivers of Great Unconformity exhumation on the southern Canadian Shield

Rebecca M Flowers and Barra A. Peak

Date created: 2023-05-12 | Date modified: 2023-07-25

d. Interpreting your results (see below)

REGISTRATION

Investigating variation in replicability: A "Many Labs" Replication Project

Brian A. Nosek, Kate Ratliff, Zeynep Cemalcilar, Heather Kappes, Grant Packard, and 39 more

Date registered: 2013-09-16 | Date modified: 2023-04-19

Context: identifier: <https://osf.io/scayl>; identifier: <https://doi.org/10.17605/OSF.IO/SCAYL>

Open resources

Data Analytic code Materials Papers Supplements

Description

We will attempt to replicate 12 effects in a single experimental package across numerous labs. Variations between lab conditions and sample characteristics will be analyzed to investigate how these factors might influence replication success.

Funder

Laura and John Arnold Foundation

Registration provider

OSF Registries

Registration template

OSF-Standard Pre-Data Collection Registration

License

CC0 1.0 Universal

URL

<https://osf.io/scayl>

DOI

<https://doi.org/10.17605/OSF.IO/SCAYL>

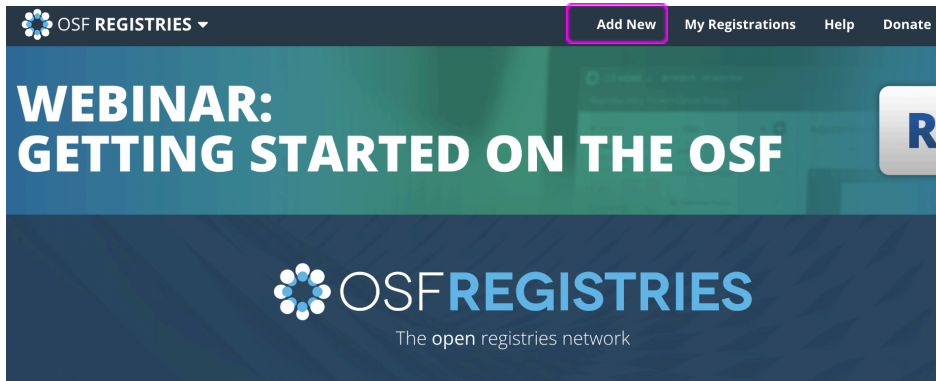
e. Video reference

f. More information about OSF Search

g. Story about OSF Search

5. Research planning with OSF Registries

- a. [Why preregister?](#)
 - i. A preregistration is a time-stamped, read-only version of the research plan created and submitted to a public registry before the study is conducted.
 - ii. Preregistrations are a formal, transparent “story” of your study. This story describes what your research planned to do, any updates that needed to be made, and the results.
 - iii. Think of it as a “study management plan” that accompanies your data management planning
 - iv. [Registrations vs preregistrations](#)
- b. Creating a research registration
 - i. [Start a registration](#)
 1. [Link](#) (when logged in)
 2. [Navigate](#) (see below)



- ii. [Choose a registration template](#)
 1. [Template descriptions](#)

Add New Registration

You are submitting to OSF Registries. [Click here](#) to learn more about other hosted registries.

STEP 1

Do you have content for registration in an existing OSF project?

YES NO

STEP 2

Which type of registration would you like to create?

- OSF Preregistration
- OSF Preregistration
- Generalized Systematic Review Registration
- Open-Ended Registration
- OSF-Standard Pre-Data Collection Registration

Copyright © 2011-2023 OSF Registries. All rights reserved. | [Privacy Policy](#) | [Status](#) | [API](#) | [Feedback](#)
TOP Guidelines | [Pre-Registration in Social Psychology](#) | [Peer Review](#) | [Giner-Sorolla, 2016: Pre-Registration](#) | [Preregistration Template from AsPredicted.org](#) | [Project: Cancer Biology](#)

- iii. [Submit your registration](#)
- iv. [Approve your registration](#)
- v. [Accessing your registration drafts](#)
 1. [Link](#) (when logged in)
 2. Navigate (see below)

OSF REGISTRIES

Add New My Registrations Help Donate

My Registrations

Drafts Submitted

Sorted by last updated

Age and Political Identification

Registration template: OSF Preregistration

Registry: Metascience Registry

Registered: Mon Sep 28 2020 14:21:54 GMT-0400

Last updated: Wed Aug 02 2023 20:22:31 GMT-0400

Contributors: Miske, Loomas, Pfeiffer, and 1 more

Description: A study on age and political identification

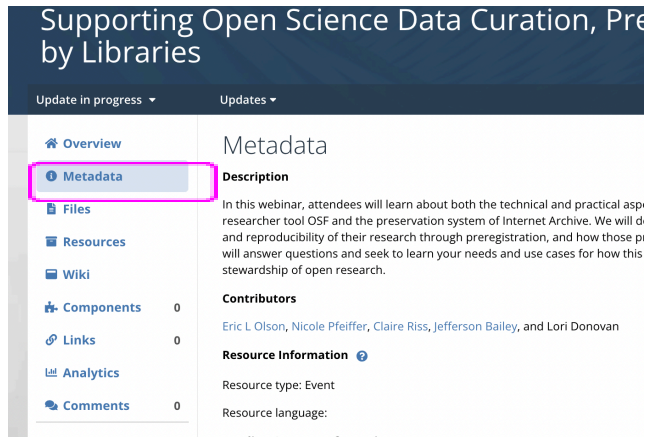
Tags: election political ideology gatest

View Update

Open resources

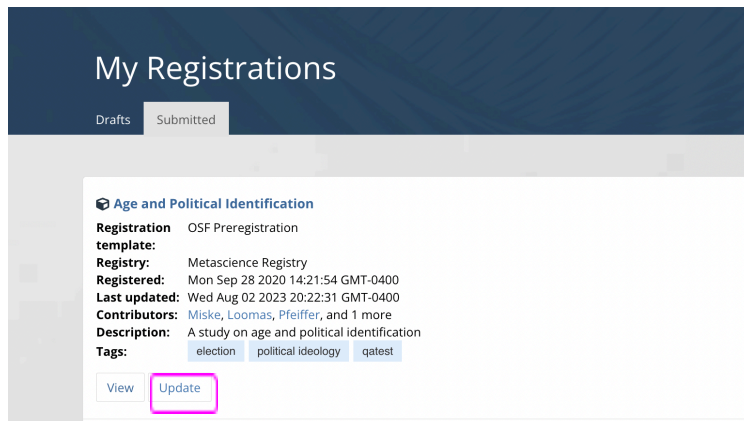
- Data
- Analytic code
- Materials
- Papers
- Supplements

- c. Metadata
 - i. Available fields
 1. [On submission](#)
 2. [After submission](#)
 - ii. Accessing registration metadata (see below)

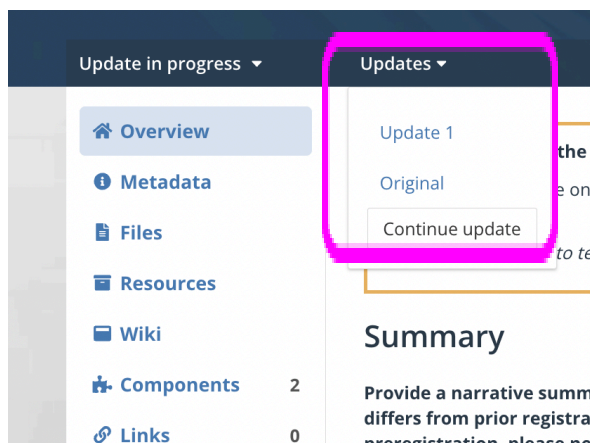


d. [Updating Registrations](#)

- i. [How to update your registration](#) (when logged in) [see below]



ii. [How to view registration updates](#)



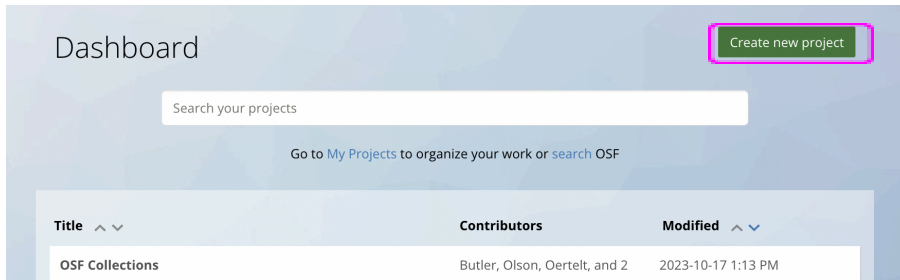
e. Branded registries

- i. Find on <https://osf.io/registries>
- f. [Video reference](#)
- g. [More information about OSF Registries](#)

6. Study management and collaboration with OSF Projects

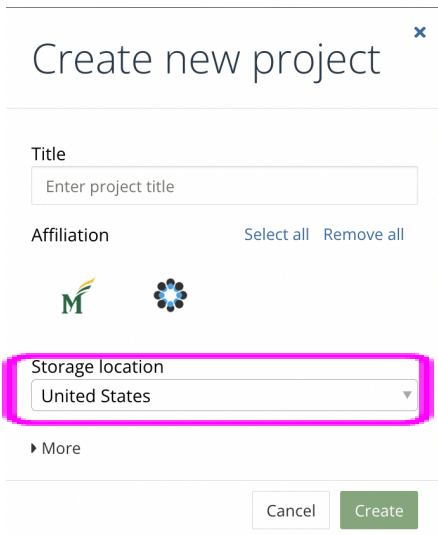
a. [Create a new OSF Project](#)

i. [Where to start](#) (when logged in) [see below]



ii. [Institutional affiliations](#) (only available for affiliates of OSF Institutions member organizations)

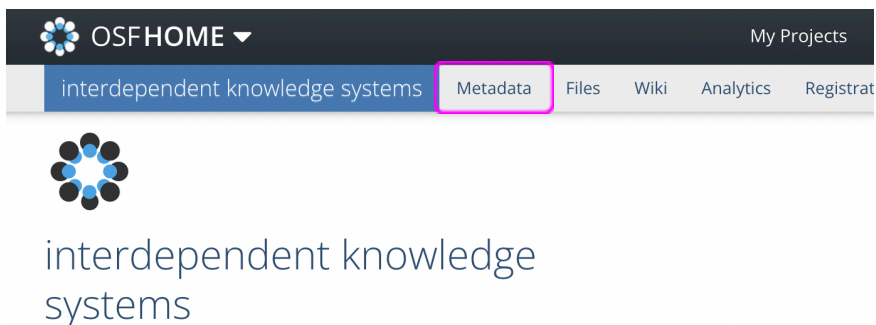
iii. [Storage region](#) (see below)

A screenshot of the 'Create new project' form. The form has a title 'Create new project' and a close button 'x'. It contains several fields: 'Title' with a text input 'Enter project title'; 'Affiliation' with a 'Select all' and 'Remove all' link and two icons; 'Storage location' with a dropdown menu showing 'United States', which is highlighted with a pink rectangular box; and a 'More' link. At the bottom, there are 'Cancel' and 'Create' buttons.

b. Metadata

i. [Available fields](#)

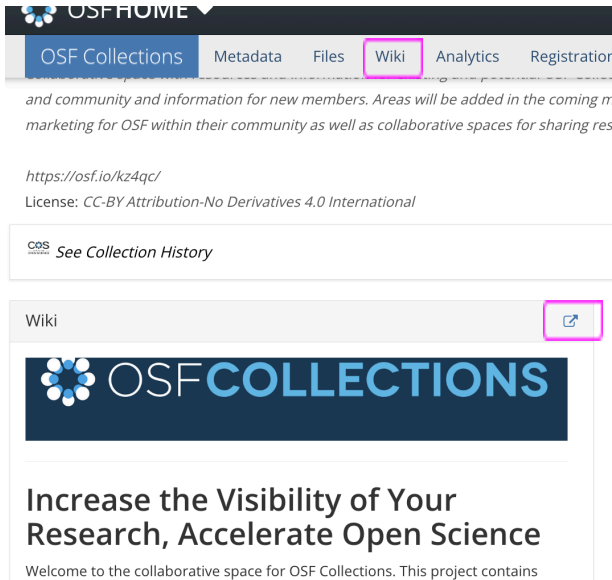
ii. Access Project metadata (see below)



c. [Upload files to your OSF Project](#)

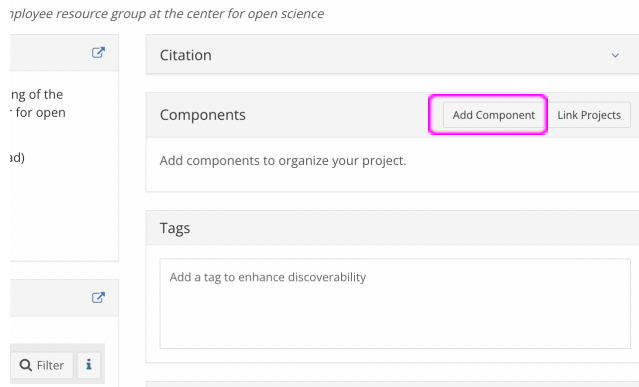
d. [Use the OSF Project wiki](#)

- i. Open/edit the project wiki (see below)



e. [Components](#)

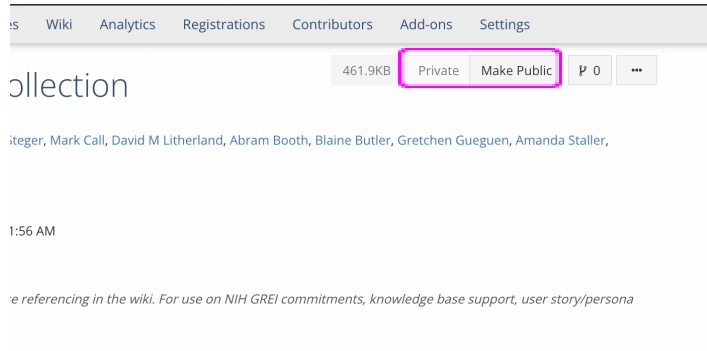
- i. Components are “child projects” within the Project directory
ii. Add a component (see below)



f. [Link projects](#)

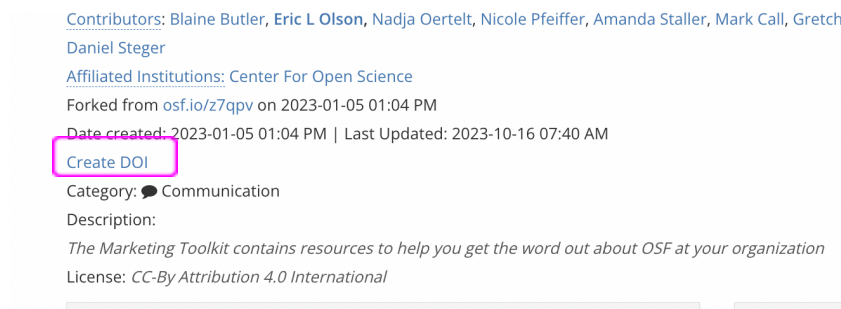
g. [Make your OSF Project public](#)

- i. How to toggle your project between private and public (see below)



h. [Create a Digital Object Identifier \(DOI\) for your OSF Project](#)

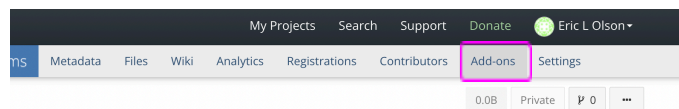
i. How to create a DOI for your public project (see below)



i. Integrations/Add-ons

i. [Available add-ons](#)

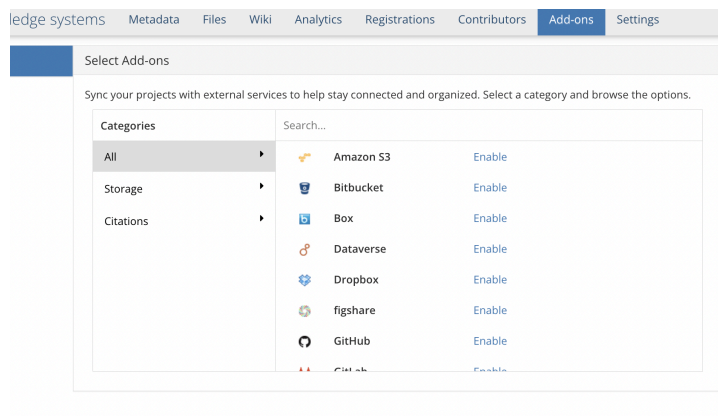
ii. Accessing OSF Project add-ons (see below)



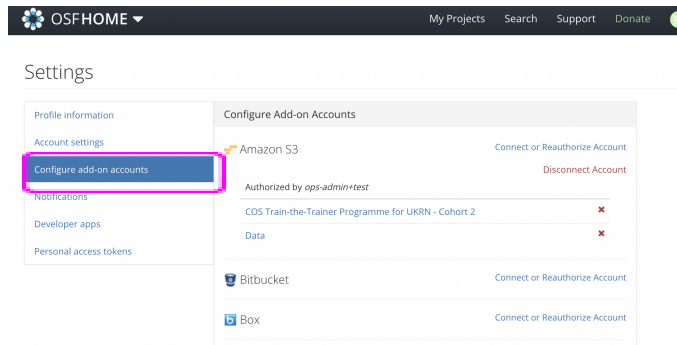
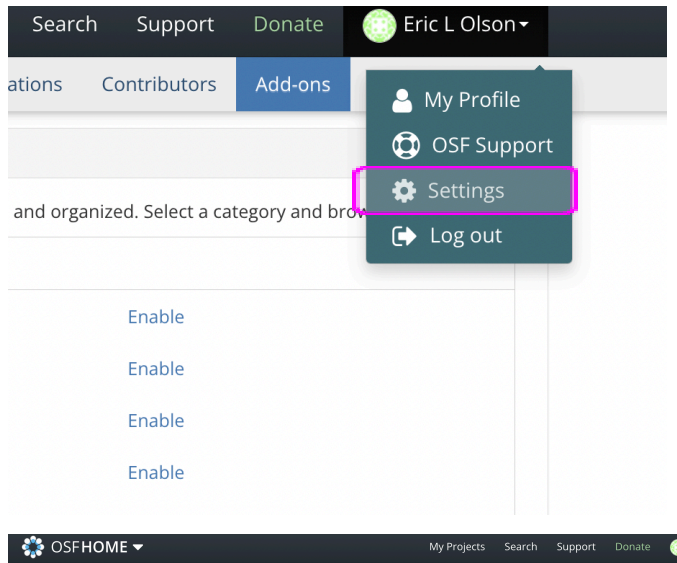
nowledge

Mawhinney, Blaine Butler, Brian J. Geiger, Eric L Olson, Futa Ikeda, Lisa Cuevas Shaw

ed: 2023-10-03 02:02 PM

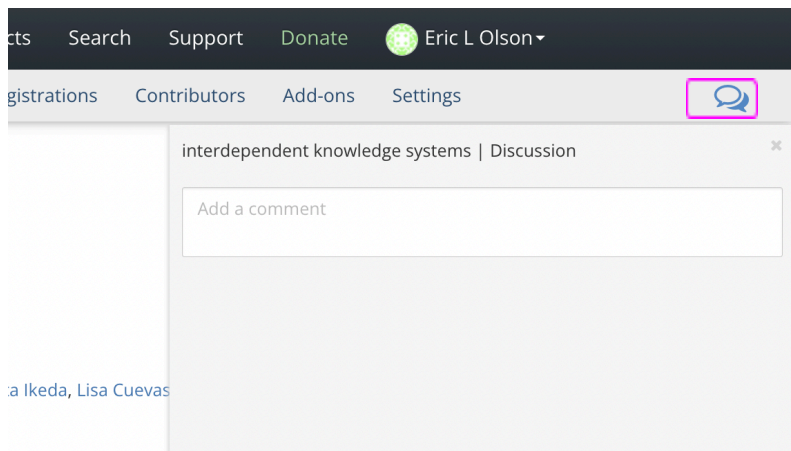


iii. Configure your add-on settings (see below)



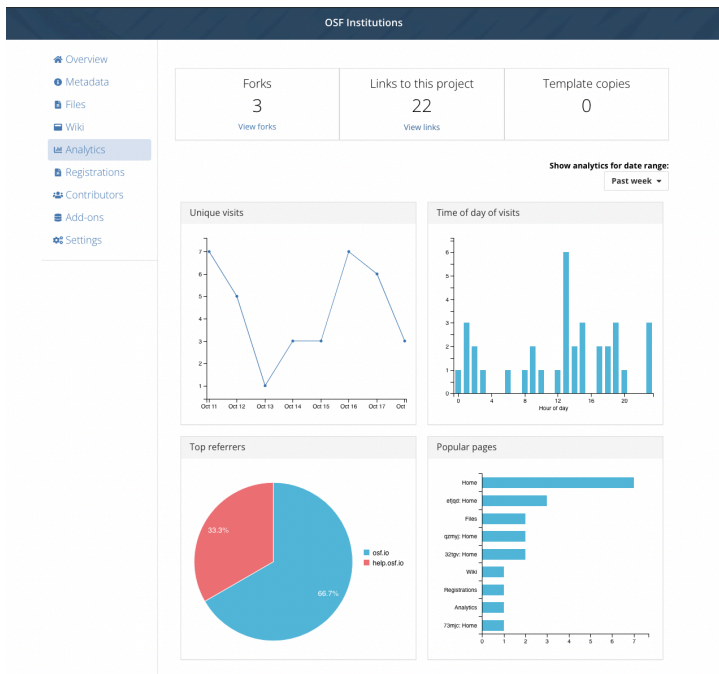
j. [Comments](#)

i. Leave a comment (see below)



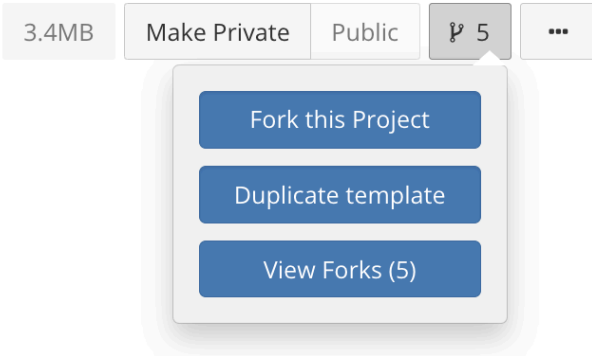
k. [Project analytics](#)

i. Access OSF Project analytics (see below)



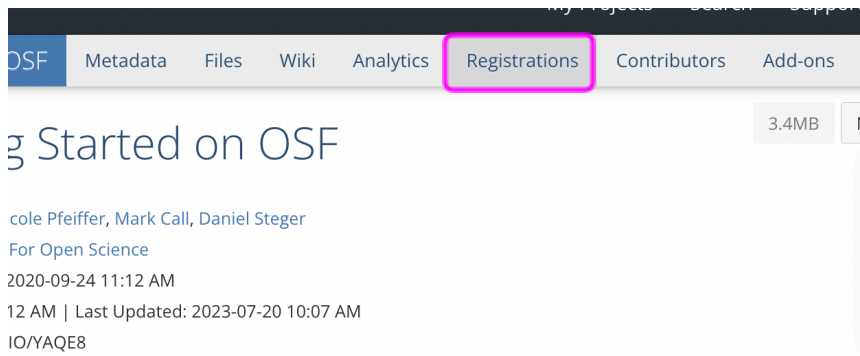
I. Templates

- i. [Example templates](#)
- ii. Forks/templating
 1. [Forking](#)
 - a. Making a copy of all accessible project content
 2. [Creating a project from a template](#)
 - a. Making a copy of only the project structure
 3. How to fork or use an OSF Project template (see below)



m. Related OSF Registrations

i. Accessing Project registrations (see below)

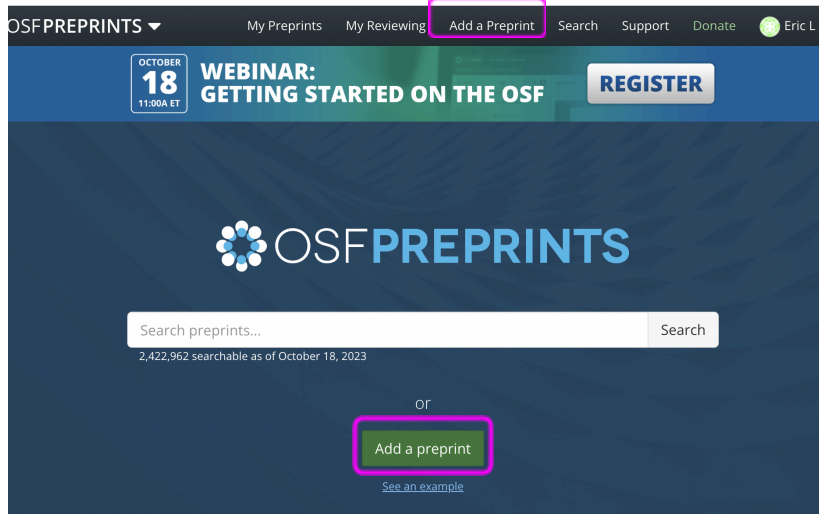


int — awesome! Now you're ready to get started, but what should you do first?

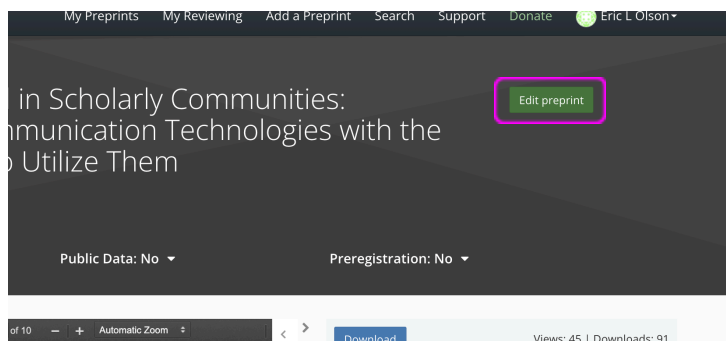
- n. [OSF Collections](#)
 - i. [Submit to an OSF Collection](#)
- o. [Video reference](#)
- p. [More information about OSF Projects](#)

7. Research sharing with OSF Preprints

- a. [Starting an OSF Preprint](#) (when logged in) [see below]



- b. Preprint metadata
 - i. [Available fields](#)
- c. [Associate an OSF Project](#)
- d. [Edit a preprint](#) (when logged in) [see below]

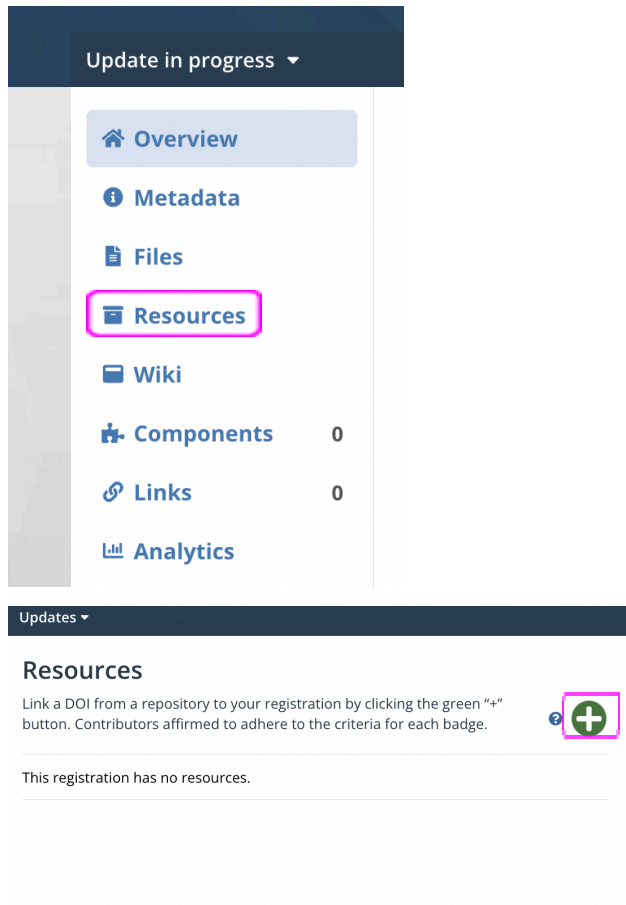


- e. [Preprint versions](#)
- f. [Branded preprints](#)
- g. [Video reference](#)
- h. [More information about OSF Preprints](#)

8. Create relationships across OSF content

a. [Connected resources](#)

- i. How to connect output resources to your registration (see below)



Update in progress ▾

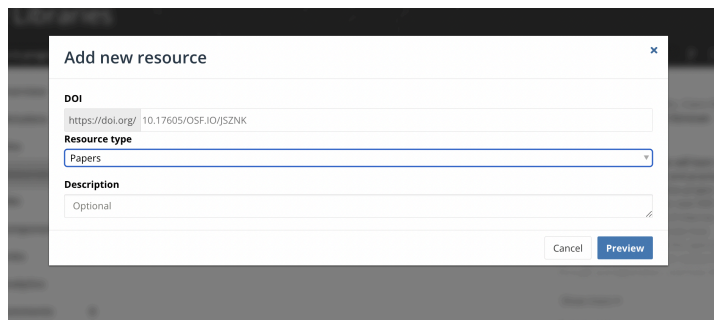
- Overview
- Metadata
- Files
- Resources**
- Wiki
- Components 0
- Links 0
- Analytics

Updates ▾

Resources

Link a DOI from a repository to your registration by clicking the green "+" button. Contributors affirmed to adhere to the criteria for each badge.

This registration has no resources.



Add new resource

DOI
https://doi.org/ 10.17605/OSF.IO/JSZNK

Resource type
Papers

Description
Optional

Cancel Preview

b. OSF is PID-ready

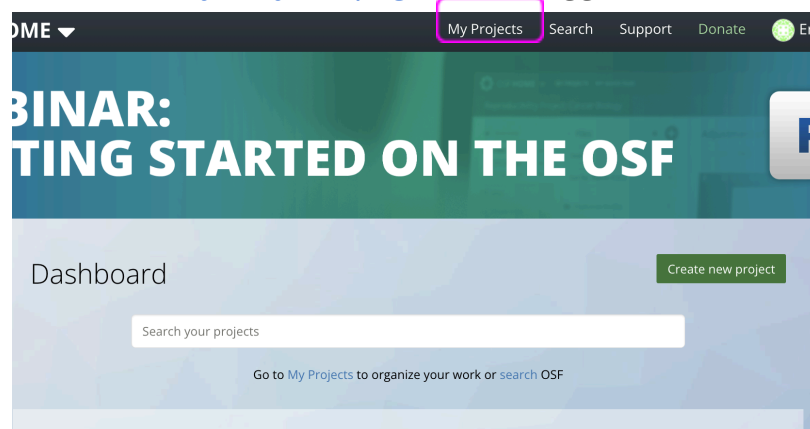
- i. [Creating, using, and sharing PIDs on OSF](#)
- ii. [Syncing OSF and your ORCID record](#)



- c. [Video reference](#)
- d. [More information about metadata and compliance standards](#)

9. Accessing my OSF content

- a. [Access the My Projects page](#) (when logged in) [see below]



- b. [Using your My Projects page](#)

10. Start using OSF

- a. [Video reference](#)
- b. [OSF Support Center](#)
- c. [Tips and Tricks](#)
- d. Contact the OSF Support Desk
 - i. support@osf.io
- e. [Webinars and Events](#)
- f. [Discuss organizational partnerships](#)
- g. Talk to us!
 - i. Please don't hesitate to send us your questions, feature requests, and the creative ways that you and your communities utilize OSF and open science practices.