Helping researchers meet funder requirements:
An overview of impending Tri-Agencies RDM policies & related Portage Network supports

James Doiron,
RDM Services Coordinator
University of Alberta Libraries

ACCOLEDS 2018
My background

- RDM Services Coordinator, UofA Libraries
- Educational background in social sciences (Psychology & Criminology)
- Cross disciplinary & institutional applied RDM experience

CARL Portage Network Initiatives:

- *Data Management Planning & RDM Training* Expert Groups;
- *Dataverse North* Working Group;
- *Dataverse North Training* Working Group (Chair)
What is Research Data Management?

RDM = managing data throughout all phases of the research lifecycle….through active phases and beyond

Data Management Plan


The statement outlines:

1. **Expectations** → DMP’s, standards, collection/storage, metadata, preservation, retention, and sharing
2. **The responsibilities of all stakeholders** to meet those expectations
Data Management Planning:

“...is necessary at all stages of the research project lifecycle, from design and inception to completion.”

“...should be developed using standardized tools”

Metadata:

“All research data should be accompanied by metadata”

Preservation:

“Research data resulting from agency funding should be preserved in a publicly accessible, secure and curated repository or other platform for discovery by others”
In the Spring of 2018, the Tri-Agencies released a draft of the “Tri-Agency Research Data Management Policy”

Incremental implementation of a final policy is expected to begin in later 2019

The draft policy includes suggested requirements related to three primary areas:
Institutional Strategy:

“Each institution administering tri-agency funds is required to create an institutional research data management strategy”

Data Management Plans:

“...specific funding opportunities may require DMPs to be submitted to the appropriate agency at time of application

Data Deposit:

“Grant recipients are required to deposit into a recognized digital repository all digital research data, metadata and code that directly support the research conclusions in journal publications, pre-prints, and other research outputs that arise from agency-supported research
Institutional shared research data stewardship

Libraries

Researchers

Faculties

Graduate Studies

Individuals, Groups and Services

Research Ethics Office

IT

Research Services Office
The Canadian Picture - Many Stakeholders

DIGITAL RESEARCH ECOSYSTEM

Support, Use, Direction, Services

Institutions, Researchers, Society

Provinces, CARL, Portage, CANARIE, Compute Canada

SSHR, NSERC, CIHR, CFI

Leadership Council, Research Data Canada

Innovation, Science & Economic Development
Portage Network

Portage is a national RDM network launched by CARL in 2015 which coalesces initiatives to build capacity and coordinate RDM activities in Canada

1. **Networks of Expertise**:  
   - Pan-Canadian RDM expertise  
   - Provide access to resources, tools, and experts in the area of RDM

2. **Infrastructure Platforms**  
   - Working with library consortia, institutions, and other infrastructure partners to assemble essential RDM infrastructure and service components

*Portage provides bi-lingual expertise and resources*
THE PORTAGE NETWORK is dedicated to the shared stewardship of research data in Canada through:

- Developing a national research data culture
- Fostering a community of practice for research data
- Building national research data services and infrastructure

Launched in 2015 by the Canadian Association of Research Libraries, Portage works within the library community to coordinate expertise, services, and technology in research data management, seeking to collaborate with other research data management stakeholders.

Research data culture represents widely shared values and principles for digital data management.

A community of practice for research data consists of stakeholders working collaboratively to ensure data are accessible to address complex research issues.

Research data management activities span sectors, domains, and jurisdictions, necessitating nationally coordinated research data management services and infrastructure.

> Read more
Goals of the Portage Network

• Build a **community of practice** for research data management (RDM)
Based on a National Network of Experts

Expert Groups
- Data Management Planning
- Curation
- Data Discovery
- Preservation
- Training
- Research Intelligence

Working Groups
- Dataverse North WG
- Responsible Research Data Management Practices for Sensitive Data
- FRDR Service Model WG
- FRDR Discovery Service WG
- Institutional RDM Strategies WG

115+ Experts
40+ Organizations

A true Network of Experts
Goals of the Portage Network

• Build a **community of practice** for research data management (RDM)

• Engage and advocate for research data management with **stakeholder communities**
Goals of the Portage Network

- Build a **community of practice** for research data management (RDM)
- Engage and advocate for research data management with **stakeholder communities**
- Facilitate and provide leadership in the **development of RDM infrastructure**
Initial focus on the emerging Tri-Agency RDM Policy
Portage Responses to Tri-Agency Policy

- Institutional RDM Strategies
- Data Management Planning
- National Repository Options

DMP Assistant: National, online, bilingual, Data Management Planning Tool

RDM Strategy Template

Dataverse
Pillar 1: Institutional RDM Strategies

1. **Raise awareness**: Policy requirements & RDM best practices
2. **Assess institutional RDM readiness**
4. **Define an RDM roadmap**: to help with capacity-building over the medium term, to ensure research excellence, efficiency, and transparency.
**Pillar 2: Data Management Planning**

**Key features:**
- Free, web-based
- Bilingual
- Walks through DMP content
- Shared access
- DMP sharing
- Living document
- Can have multiple DMPs
- Export function

Hosted nationally by UofA Libraries
Pillar 2: Data Management Planning
Migration to a new DMP Codebase

Portage DMP Assistant 2.0

Based on single, open-source platform: DMP Roadmap

Joint initiative:
- Digital Curation Centre
- University of California Curation Centre

New features:
- Provides foundation for machine actionable DMPs
- Supports DMPs as “living documents”
- Supports use of ORCID IDs
- Includes APIs for creating and sharing DMPs
- Supports researchers ‘opting in’ to share their DMP
Pillar 3: Data Deposit into a Repository

Expert Groups
- Curation
- Data Discovery
- Preservation
- Training
- Research Intelligence

Working Groups
- Dataverse North WG
- FRDRR Service Model WG
- FRDRR Discovery Service WG

- Institutional RDM Strategies
- Data Management Planning
- National Repository Options
Main Features:

- ‘Big Data’ upload/download
- Maintains file hierarchies
- National Discovery Platform
- National Repository Option
- Preservation Processing capacity
- Scalable solution

Anyone may currently use FRDR to search for and download data from a growing catalogue of Canadian data repositories.

FRDR’s repository services are being offered to a growing list of Canadian researchers across both scope and discipline.
Find and Share Canadian Research Data

Find Data
Search FRDR to find research datasets originating from researchers affiliated with Canadian institutions. Data deposited to other repositories across Canada can also be found by searching in FRDR. View the growing list of collaborating repositories.

Deposit Data
Any researcher affiliated with a Canadian institution can deposit data into FRDR. The platform can efficiently ingest datasets of any size, and preservation processing is done automatically. Data professionals from the Portage Network and institutions across Canada work with researchers to curate and approve deposited items.

FRDR DEMO SITE AVAILABLE
https://demo.frdr.ca/repo/?locale=en
Pillar 3: Data Deposit into a Repository

Dataverse

Mature platform
Widely adopted
User-friendly
Brandable
Possible National Repository Option

Dataverse used widely in Canada with 1000’s of data files deposited
Open source research data repository software

Enjoy full control over your data. Receive web visibility, academic credit, and increased citation counts. A personal dataverse is easy to set up, allows you to display your data on your personal website, can be branded uniquely as your research program, makes your data more discoverable to the research community, and satisfies data management plans. Want to set up your personal dataverse?

Seamlessly manage the submission, review, and publication of data associated with published articles. Establish an unbreakable link between articles in your journal and associated data. Participate in the open data movement by using Dataverse as part of your journal data policy or list of repository recommendations. Want to find out more about journal dataverses?

Establish a research data management solution for your community. Federate with a growing list of Dataverse repositories worldwide for increased discoverability of your community’s data. Participate in the drive to set norms for sharing, preserving, citing, exploring, and analyzing research data. Want to install a Dataverse repository?

http://dataverse.org/
Pillar 3: Data Deposit into a Repository

Dataverse Features:

- Digital Object Identifier (DOI) assigned
- User controlled data access
- Many types of data
- Built in data citations
- Usage metrics
- Brandable

Portage Training Materials in development

Persistent identifier assigned when upload data

Automatically registered with DataCite
https://www.datacite.org/

From fully open to restricted access

Tabular (CSV, SPSS, R, etc)
Documentation (pdf, doc, text)
Geospatial data
Multimedia (audio-visual)

Madueke, Ijeoma Sylvia, 2018, "NIGERIAN LITERATURE IN FRENCH TRANSLATION (NILIFT)",
https://doi.org/10.7939/DVN/CHNOHA

Including a customizable guestbook

High level as well as in-depth web based training modules
Training Expert Group: Online RDM Training Resources

Portage Training Resources

Communities of Practice
How to Manage Your Data
Infrastructure Platforms
Work with Portage
About Portage

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News

- Call for Participation: Portage Research Intelligence Expert Group - September 6, 2018
- Appointment of Sarah Wilkinson as a CARL Project Officer - September 6, 2018
- A new comprehensive overview of the Portage Network: “Addressing Gaps in Canadian Research Data Management.” - September 5, 2018
Portage Primer Series

Dataverse & DMP focused Primers soon to come!
‘Good Enough’ Busy Bee series

......’Good Enough’ Dataverse & DMP materials soon to come!
Online RDM Training Modules

Working groups were formed for developing of initial web-based RDM training modules

1. **RDM 101** (Lead, Carol Perry, Guelph University)
   - Web-based training module introducing general RDM topics complementing RDM web content available through academic libraries in Canada.
   - Projected Jan 2019

2. **DMPs** (Lead, James Doiron, U of A)
   - Web-based training module on Data Management Plans (DMPs), including in-depth guidance regarding categories and content development.
   - Projected Feb 2019

3. **Dataverse** (Lead, James Doiron, U of A)
   - Web-based training module on Dataverse include key features and how both to access and use Dataverse.
   - Projected Spring 2019
Acknowledgements

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Thanks!

James Doiron
RDM Services Coordinator
UofA Libraries
jdoiron@ualberta.ca