



SERVICES PARTAGÉS POUR LES DONNÉES DE RECHERCHE
SHARED STEWARDSHIP OF RESEARCH DATA

A faint, light gray network diagram is overlaid on the right side of the slide. It consists of several circular nodes of varying sizes connected by thin lines, forming a complex web-like structure. The nodes are distributed across the right half of the slide, with some larger nodes acting as hubs.

Portage and RDM in Canada

Round Table Discussion of the Portage Council of Chairs

Centre Mont-Royal, Montreal QC
September 18 2017

Portage Expert Group Representatives

- **Data Management Planning Expert Group**

Jeff Moon, Portage (former Chair)

- **Curation Expert Group**

Jay Brodeur, McMaster University (Chair)

- **Preservation Expert Group**

Umar Qasim, University of Alberta (Chair)

- **Data Discovery Expert Group**

Amber Leahey, Scholars Portal, on behalf of Eugene Barsky, UBC (Chair)

- **Training Expert Group**

Jane Fry, Carleton University (Chair)

- **Research Intelligence Expert Group**

Lyne Da Sylva, Université de Montréal, on behalf of Dylanne Dearborn, University of Toronto (Chair)

- **Dataverse North Working Group**

Lisa Goddard, University of Victoria (Chair)

DMP Expert Group (2017-18)

TOOLS & TEMPLATES

The **Data Management Planning Expert Group (DMPEG)** launched and continues to manage development of the Portage national data management planning platform, the **DMP Assistant**.

DMPEG also developed and is nurturing the **Portage General Stewardship Template** and associated guidance. Look for revisions to the general template and the addition of discipline-specific templates in future.

DMPEG activities *align with and advance* Portage's national DMP service objectives:

- To provide **tools** that support **best practices** in research data stewardship and that promote a **strong data culture** in Canada;
- To **facilitate the sharing of research administrative information** across research organizations and agencies;
- To **improve coordination among local, regional, & national research service organizations**; and
- To **reduce administrative burden** on researchers.

DMP Expert Group (2017-18)

1. DMP Service Model under new Tri-agency RDM policy

Develop service principles related to the Portage DMP Assistant

Core principle: forge and strengthen links between

Liaison Librarians – RDM Librarians – Researchers

- Provide support via training, consultation, & helpdesk...
- Seek and incorporate feedback into the tool and template
- Address question of support for schools with no RDM service

DMP Expert Group (2017-18)

2. Next-generation DMP Platforms

- See **DMPs** as *living documents* that should be *machine-actionable* and *interoperable* with other systems to support: data discovery, capacity planning, aggregation/integration of systems, & policy compliance
- Better integrate **RDM platforms** to make connections with repositories and registries
- Enable *efficient local customization* while retaining best practices
- Promote archiving and sharing of DMPs

DMP Expert Group (2017-18)

3. Data Licensing Challenges

DMPEG has worked on **licencing issues** surrounding the use of DMP Assistant and the ownership of DMPs. It has been suggested that DMPEG investigate questions surrounding **data licencing** with the goal of providing suggestions for moving forward.

DMPEG is considering options (e.g. joint working groups) to address issues such as this, as they relate directly to sections of the data stewardship template (so, in this case 'Ethics and Legal Compliance' and 'Sharing & Reuse')

Curation Expert Group

Goal:

- Identify, evaluate, promote best practices, resources, workflows that support data sharing and reusability:
 1. For researchers within projects
 2. Within data repositories

Objectives:

- Evaluate curation models and sustainable workflows that may be applied to individual projects and at the national/federated scale
- Identify gaps in resources and expertise needed to support workflows
- Work with infrastructure providers (e.g. FRDR) to refine workflows

Curation Expert Group

Work in 2016-17

- Continued participation with FRDR to test, evaluate, and provide feedback on curation workflows
- Composing a white paper outlining requirements to support effective data curation for data repositories across Canada
 - Describe the Canadian context; identify expertise & knowledge gaps
 - Identify aspirational targets (idealized data curation environment)
 - Outline developmental goals
 - Identify 'upstream' activities for further exploration & WG focus

Curation Expert Group

Focus for 2017-18

- Identify 'upstream' activities for further exploration & WG focus
 - Tools and workflows (metadata harvesting; in-project curation)
 - Training, outreach and engagement
 - Network development
 - Metadata standardization/harmonization
- Overlap with other EGs
 - RIEG: understanding the tools and workflows of researchers
 - TEG: providing training on toolkits and curation practices
 - PEG: better understanding requirements for preservation
 - DMPEG: capturing and promoting in-project data curation activities

Preservation Expert Group

Objectives

- Provide Portage with advice on research data management (RDM) infrastructure developments supporting the long-term stewardship and access to research data and metadata.
- Identify gaps in the RDM preservation infrastructure in Canada and recommending ways of providing a fully functional infrastructure.

Preservation Expert Group

Activities

- Contribute to Portage infrastructure development projects (e.g. FRDR)
- Monitor and support preservation processing workflows (e.g., Dataverse2Archivematica)
- Support the development of community-based best practices e.g. Format registry etc.
- Envision and develop a protocol for organizations to contribute to a Portage federated storage network.
- Highlight and advocate data preservation priorities within the Canadian digital preservation community
- Provide support to other EGs e.g. TEG, CEG

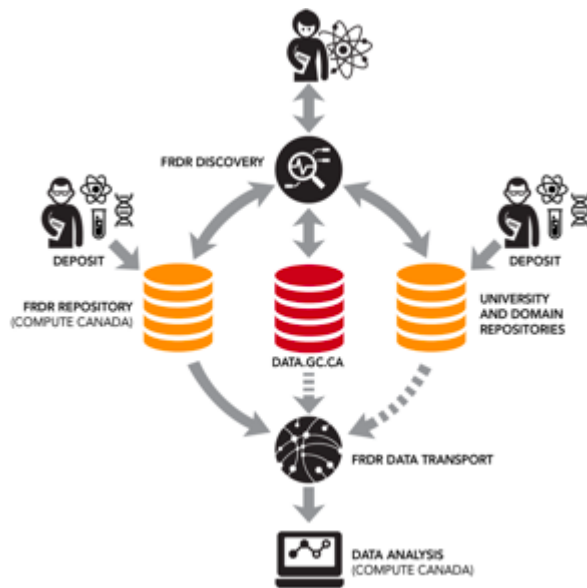
Data Discovery Expert Group

Research Data need to be discoverable...

- DDEG provides expertise around discovery of Canadian research data
- Provides feedback for the development of a national data discovery service (Portage – Compute Canada Federated Research Data Repository (FRDR))
- Guides two working groups:
 - Collections Development Working Group (DD-CDWG)
 - Berenica Vejvoda, Chair
 - Metadata Working Group (DD-MWG)
 - Amber Leahey, Chair

Data Discovery Expert Group

Data Discovery in Canada



The screenshot shows the FRDR BETA search interface. The search term is 'bird migration'. The results page shows 294 results found. The interface includes a search bar, a filter results section with a date range graph, and a list of search results with details like 'Migration', 'Migration Estimates, 1997', and 'Christmas Bird Count'.

Source	Count
Polar Data Network	175
Open Data Canada	97
Abacus Dataverse Network	8
BC Data Catalogue	7
University of Alberta Dataverse	4
Carleton University Dataverse	1
UBC Circle	1
University of Toronto Dataverse	1

Taken from Compute Canada <https://www.computecanada.ca/techrenewal/rdm/>

Data Discovery Expert Group

What is research data?

- The Collections Development WG defines research data for purposes of building a national data discovery service:

“Data that are used as primary sources to support technical or scientific enquiry, research, scholarship, or artistic activity, and that are used as evidence in the research process and/or are commonly accepted in the research community as necessary to validate research findings and results.” (adapted from CASRAI RDM Glossary)

- The group defined types of data repositories for understanding roles when it comes to making research data discoverable
- A list of 10 Canadian data repositories were selected by CDWG for inclusion in FRDR this year (2017)

Data Discovery Expert Group

How many standards are there?!

- Too many; no really!
- The Metadata WG identified over 20 disciplinary metadata standards in use by research data repositories
- The group worked to map 13 standards to the FRDR Discovery Profile (Dublin Core +)
 - Crosswalks developed will assist with metadata harvesting and normalization for the purposes of searching in the FRDR discovery interface
- Some custom mapping will be required moving forward

Data Discovery Expert Group

Research data and the scholarly ecosystem

- Research data don't exist in a vacuum
 - Research data are related to other scholarly outputs such as publications, DMPs, grants, research instruments, researchers, etc.
- Ensuring that research data are made discoverable requires consideration for how research data link to other related resources in the scholarly ecosystem
 - Working with Research Data Canada to understand the broader research metadata landscape in Canada (RDC Research Metadata WG);
 - Discussions with research metadata aggregators such as SHARE to understand challenges in bringing together large amounts of disparate research information

Data Discovery Expert Group

Outputs (2017)

- Collections Development Phase 1 Report (July 2017)
 - Defines research data
 - Classifies data repositories
 - Scopes over 200 Canadian research data repositories
- Metadata Working Group Progress Report (September 2017)
 - Identifies disciplinary and general metadata standards
 - Defines the FRDR Discovery Profile
 - Crosswalks for 13 standards

Data Discovery Expert Group

Moving forward (2018-)

- Focus on outreach to more than 200 Canadian research data repos
- Harvesting and mapping metadata
- Standards adoption and documentation where needed
- Partnership with other national and international research data discovery and research metadata organizations

Dataverse North Working Group

Terms of Reference

- Explore a common business model to level the access to universities across Canada.
- Coordinate and develop a framework for Dataverse hosting and support services.
- Promote Dataverse and develop a framework for training and support.
- Identify areas for technical development of the Dataverse system and key integrations in support of Portage's overall RDM Framework.

Dataverse North Working Group

Year 1

The Business Model Advisory Group

- Document the major Canadian Dataverse providers: fees & funding models, service level agreements (SLAs), versions, levels of support, limits (e.g. file sizes, number of objects, number of collections)
- Consider opportunities for service and policy alignment

The Portage Training Advisory Group

- Work with the Portage Training Expert Group
- Identify the kinds of training that are most desirable for librarians, library staff, faculty, researchers
- Gather existing training documentation from members & related orgs
- Propose models for sharing docs & offering shared training sessions

The Portage Metadata Advisory Group

- Recommendations for default CARL metadata template
- Recommendations for DOIs & identifiers (e.g. ORCID)
- Recommendations for organizing and labelling data files

Dataverse North Working Group

Year 2

Long Term Preservation

- a. Work with the Portage Preservation Expert Group
- b. Storage infrastructure, duplication across jurisdictions, ingest tools
- c. Cost model

Integration and Dev Group

- a. Identify areas for technical development of the Dataverse system
- b. Provide project and testing support for tool integrations, including Dataverse - Archivematica integration, Open Journals System, ORCID-CA, and Open Science Framework integration

Training Expert Group

Objectives:

- To develop & maintain a high-level training roadmap for RDM in Canada
- To organize & oversee working groups that will prepare & support RDM training materials

Specifically:

- To develop Canadian RDM resources
 - All resources Portage develops will be bilingual & freely available
- To co-ordinate with other EG to determine
 - What training is needed
 - What resources they can offer to help with training
- To use existing resources when available
 - Don't re-invent the wheel!

Training Expert Group

Key accomplishments:

- “RDM Training Landscape in Canada: A White Paper” (January 2017)
- RDM Training Principles (March 2017)
- RDM Primer (May 2017)
- Presentation at IASSIST (May 2017)
- RDM Equivalents in French and English (May 2017)
- New tab on Portage website for “Training Resources” (Sept 2017)
- External Training Resources Library (Sept 2017)
- RDM Training Request Assistance Form (Sept 2017)

In progress:

- 2 Working Groups to develop online Training Modules
 - RDM 101 and DMP Basics
- Planning for 3 other training events

Training Expert Group

In the future:

- National Training
 - One day events, collocated
- Train the Trainers
 - 2 day sessions
- Complete other White Paper recommendations
 - Address training issues and gaps
 - MOU – establish partnerships in developing RDM training materials
- More in-depth online training modules
 - Discipline-specific
 - For different stakeholders

Research Intelligence Expert Group

Goal:

- Provide Portage with intelligence on RDM in Canada through a high-level roadmap that identifies topics needing new knowledge and information
- Oversee working groups responsible for specific studies addressing these knowledge and information needs.

Research Intelligence Expert Group

2016/2017

- Created DMP questionnaire for SSHRC focus group
- Developed approach for roadmap
 - Develop taxonomy to assess current international and Canadian knowledge
 - Identify RDM topical areas to study to fill information gaps in Canada
- Formed a clearinghouse for the RDM university survey consortium
 - Integrate into Portage website
 - Develop supporting information for new universities undertaking surveys (e.g., agreement form to share results)

Research Intelligence Expert Group

2017/2018

- Survey clearinghouse documents translated/published, reach out to new institutions, analyze and distribute results relevant to EGs
- Complete roadmap document
 - Assessment of international and Canadian content
 - Address list of potential ideas based on identified information gaps and discussions with other EGs
 - Identify research priorities (in collaboration with other EGs)
- Develop working groups to address research needed