



UNIVERSITY OF ALBERTA  
LIBRARIES

# SSHRC Partnership Grants Program Support Session: **Research Data Management**

James Doiron,  
RDM Services Coordinator  
UofA Libraries

*May 22, 2019*

# Background

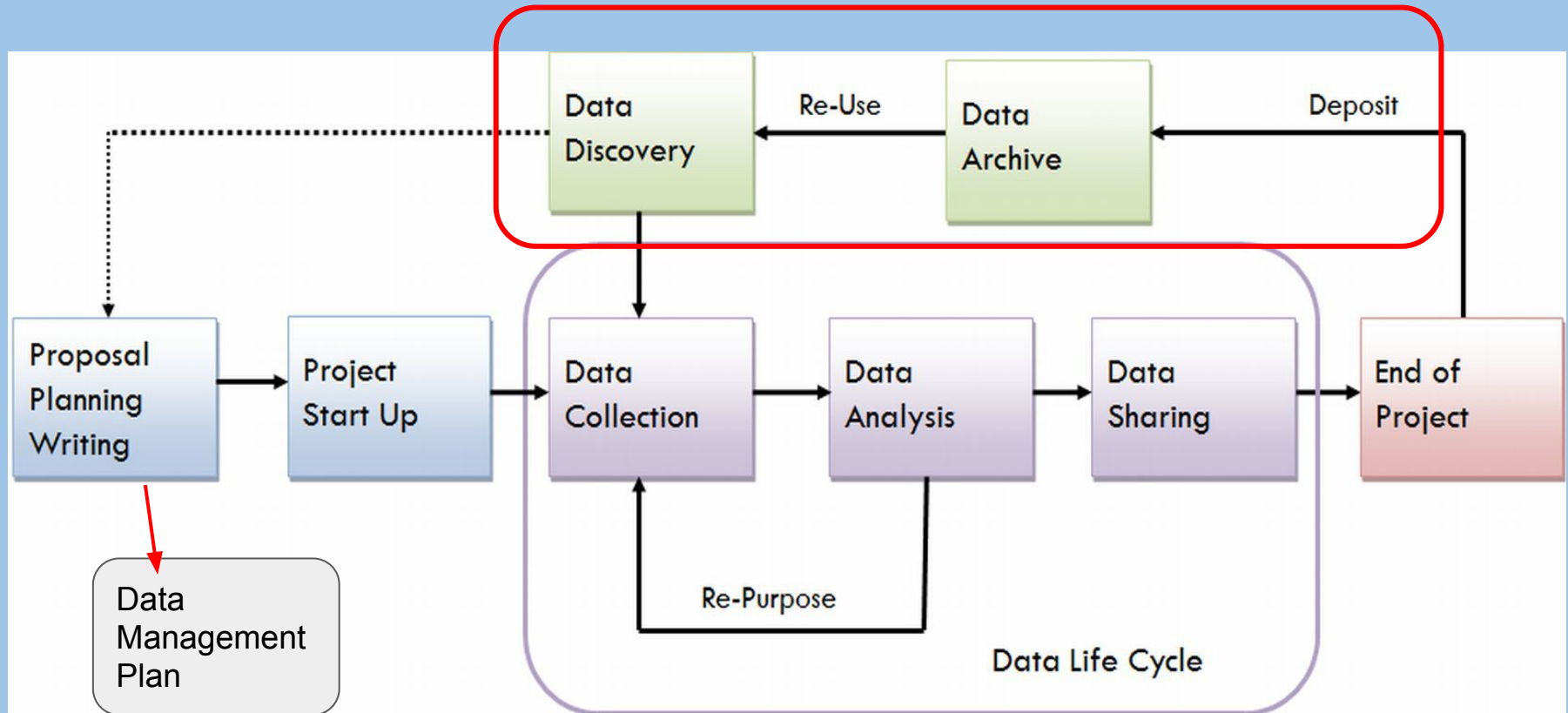
- RDM Services Coordinator, UofA Libraries
- Educational background in social sciences (Psychology & Criminology)
- Cross disciplinary & multi-institutional applied research data management experience

## **RDM Initiatives:**

- UofA Institutional RDM Strategy Working Group
- CARL Portage Network:
  - Expert Groups: *Data Management Planning (co-Chair); RDM Training*
  - Working Groups: *Dataverse North; Dataverse Training*
- UofA Health Research Ethics Board
- Statistic Canada Data Liberation Initiative (DLI) External Advisory Committee

# What is Research Data Management?

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



# Tri-Agency Statement - 2016



- In June 2016, The Tri-Agencies (SSHRC, CIHR, NSERC) released a [Statement of Principles on Digital Data Management](#)
- Statement aligns with other national endeavours relating to RDM, including the Government of Canada's [Action Plan on Open Government](#) (2014)

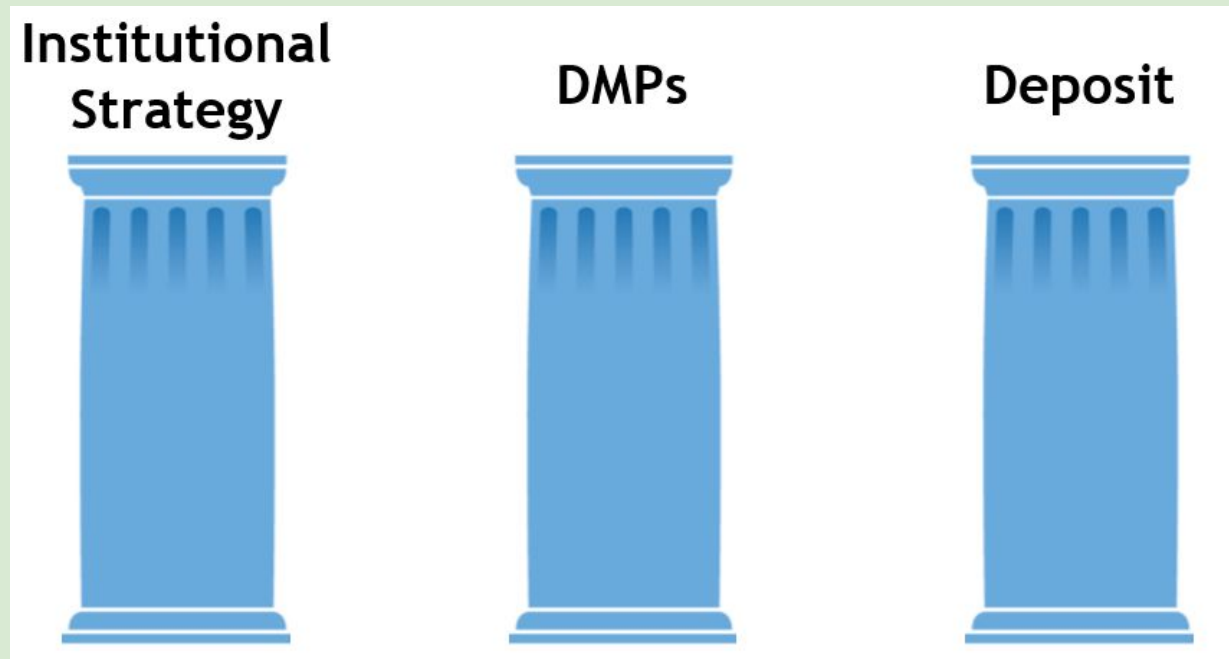
## The statement outlines:

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

# Tri-Agency RDM Policy (Draft) - 2018

- 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:



# Tri-Agency RDM Draft Policy - “Take away points”

## **Institutional Strategy:**

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

## **Data Management Plans:**

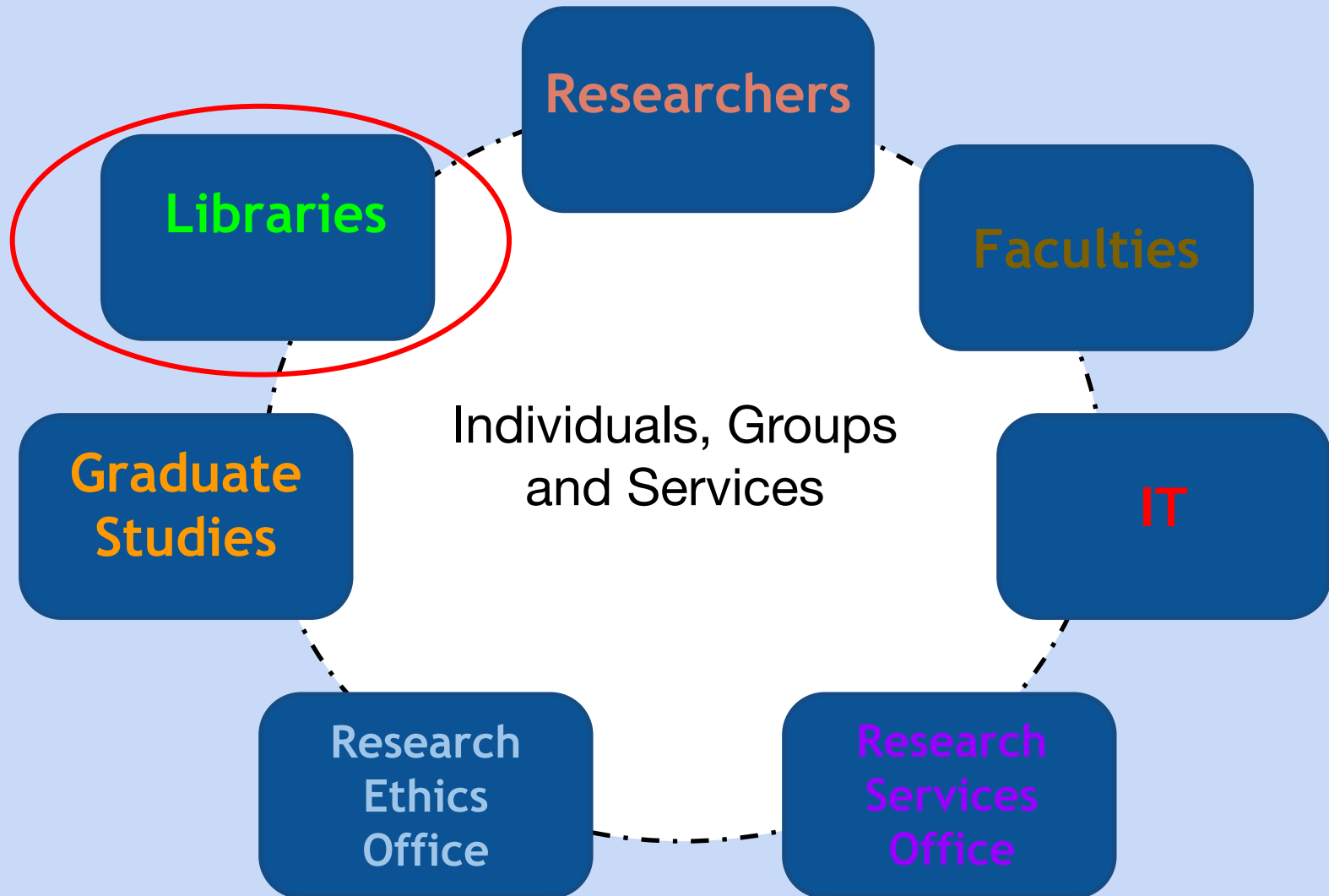
*“...specific funding opportunities may require DMPs to be submitted to the appropriate agency at time of application”*

## **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”*

UofA:

# Institutional shared research data stewardship



# 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](#)



## DMP Assistant

**Sign In**

If you have an existing account with DMP Assistant or previous version of DMP Builder.

**Sign Up**

New to DMP Assistant? Sign up today.



## News

- Portage Awarded Connection Grant: Canadian Data Curation Forum - April 4, 2019
- Call for Participation: The FRDR User Experience and Training Working Group - March 20, 2019
- Call for Participation: The FAST & the FRDR Working Group - March 20, 2019

## Filters:

**Order**

**Producer**

# Based on a National Network of Experts

## Expert Groups

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

115+

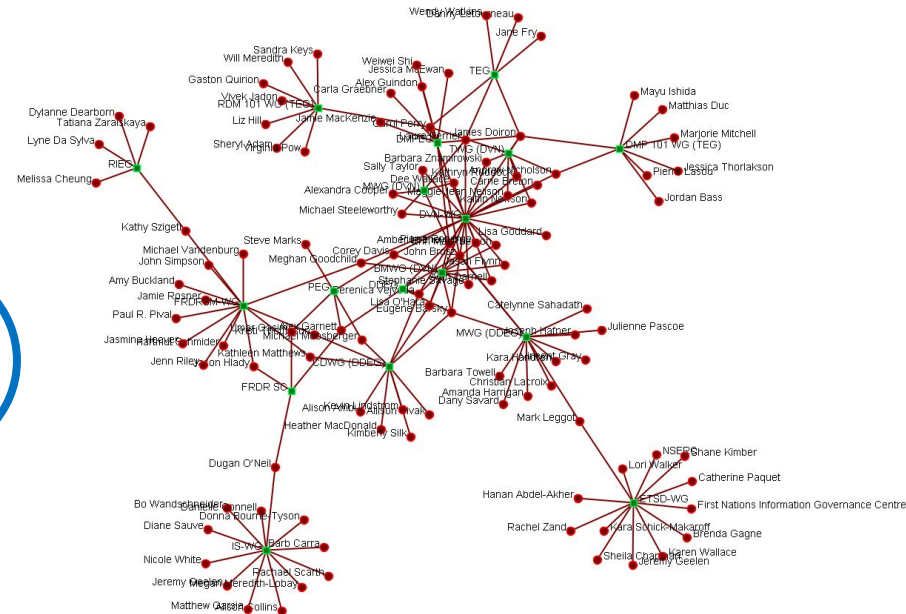
Experts

## 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

40+

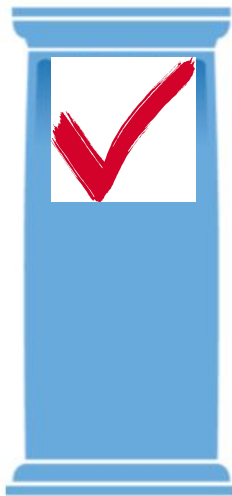
Organizations



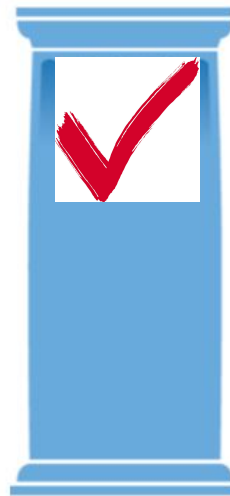
A true  
Network of Experts

# UofA Libraries & Portage: Delivering RDM supports and services

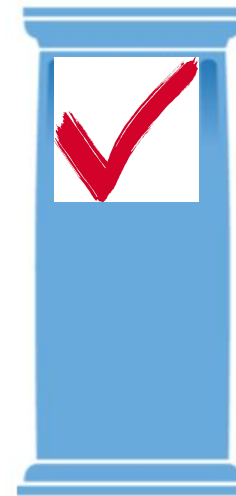
Institutional  
Strategy



DMPs

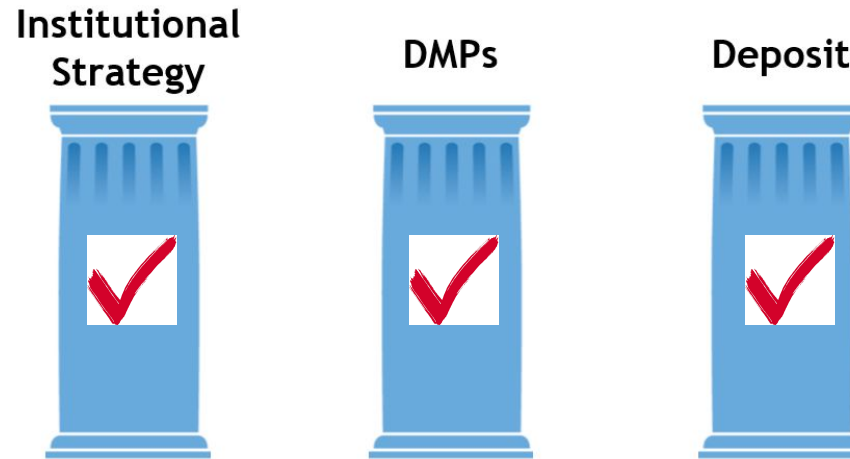


Deposit



Preparing for the  
**Tri-Agency RDM Policy**

# Responses to Tri-Agency Policy



✓ Institutional RDM Strategies

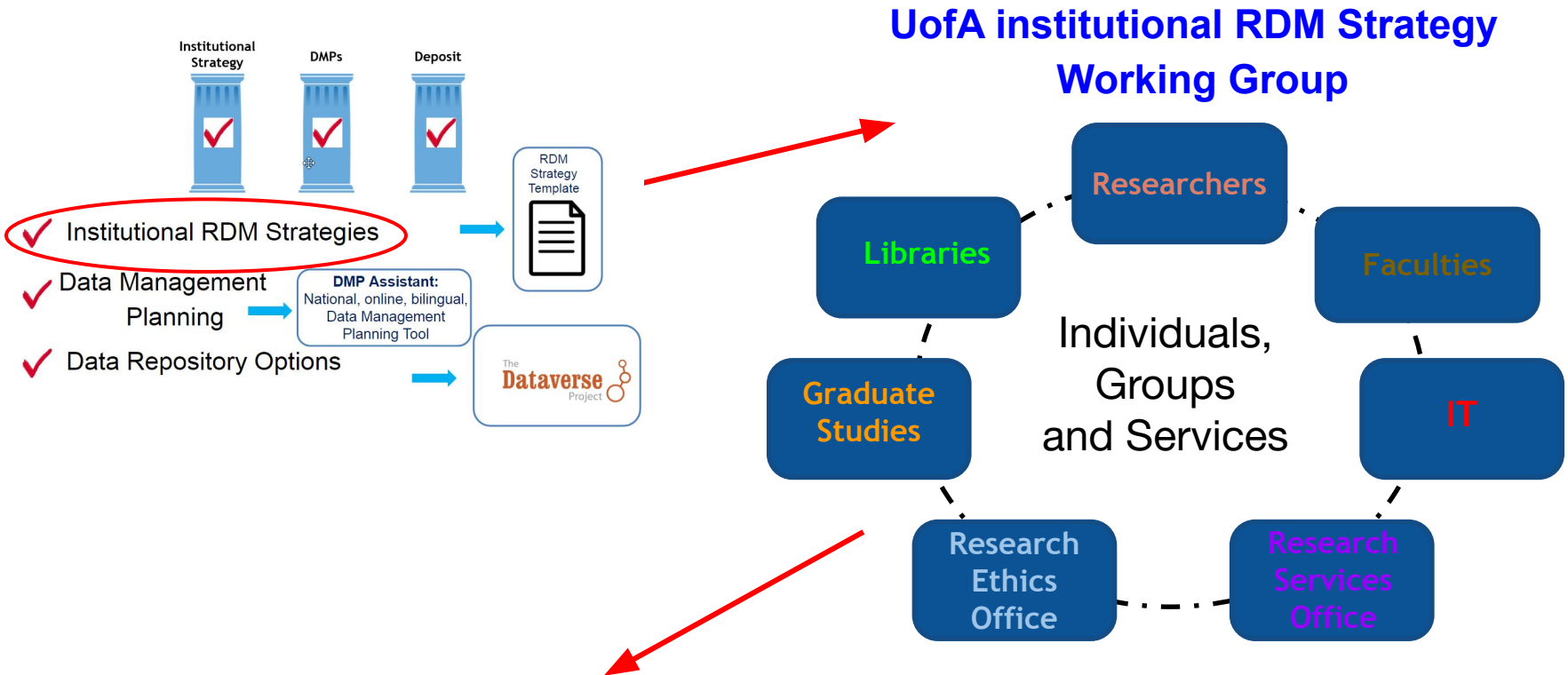
✓ Data Management Planning

✓ Institutional Data Repository

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

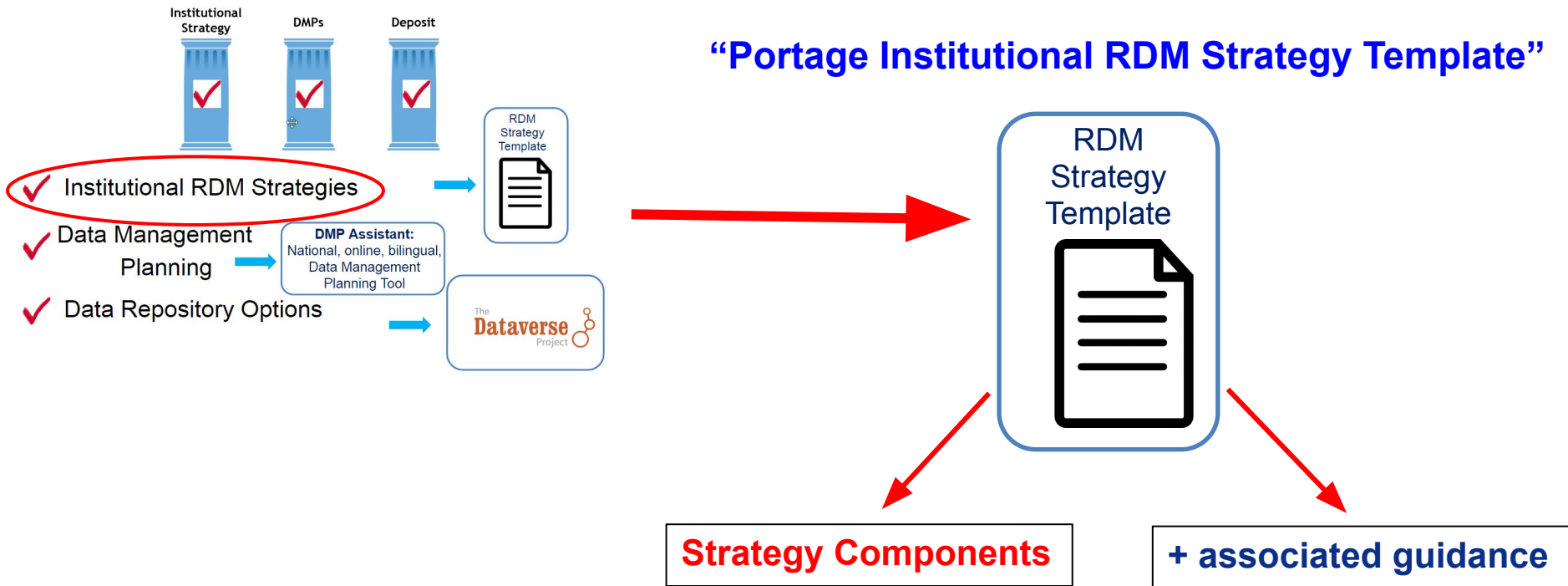


# Pillar 1: Institutional RDM Strategies



- Comprised of key stakeholder groups from across campus
- Co-Chairs: Alex Clark (Assoc VP Research) & Geoff Harder (AUL, Digital Initiatives)
- Endorsed by the President's Executive Committee - Operations (PEC-O)
- Focus is on development of a high level institutional RDM strategy
- Immediate goal is to have a reasonable framework of the strategy in place for when the Tri-Agencies release their RDM policies (Q4 2019/Q1 2020)

# Pillar 1: Institutional RDM Strategies



1. **Raise awareness:** Policy requirements & RDM best practices
2. **Assess institutional RDM readiness**
3. **Formalize RDM practices:** Guidelines, best practices, & policies – establish institutional commitment and expectations.
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



DMP

- ✓ Institutional RDM Strategy
- ✓ Data Management Planning
- ✓ Data Repository Options

- The Portage DMP Assistant is a national & freely available 'gold standard' platform for supporting researchers in developing data management plans.
- The Tri-Agencies draft RDM policy states:

***“Grant applicants are encouraged to use standardized tools to develop their DMPs, such as the Portage Network’s DMP Assistant.”***

**University of Alberta Libraries provides all of the necessary infrastructure, development expertise and hosting services for supporting the DMP Assistant nationally**



<https://www.library.ualberta.ca/research-support/data-management>



[Version française](#)

[Home](#) [About](#) [Help](#)

## Research Data Management

### Organize my data

How to prepare a data management plan & protect your data

### Share my data

Why you would share, data sharing tools, metadata & how to get credit

[DMP Assistant](#) [Dataverse](#)

[Get help and contact us](#)

[Events & Workshops](#)

### Access existing data

How to locate data and access data tools, terms & citations

### Archive my data

How to find a repository, prepare your data & submit your data

DMP Assistant is a bilingual tool for preparing data management plans (DMPs). The tool follows best practices in data stewardship and walks researchers step-by-step through key questions about data management.

- Step 1** Sign up with DMP Assistant
- Step 2** Sign in and select a template under Organizations. The Portage template is the default.
- Step 3** Answer the questions that are relevant to your work. Guidance and examples are provided.
- Step 4** Revisit the tool throughout your research to review or revise your answers.

Sign in



If you have an existing account with DMP Assistant or previous version of DMP Builder.

Sign up



New to DMP Assistant? Sign up today.

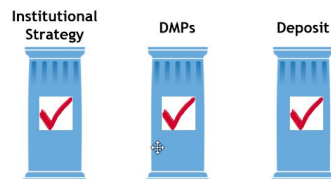
Please note that we are currently working on single sign-in authentication. For now, please create a new DMP Assistant account. You will have the option to link your DMP Assistant account to your campus ID when that feature becomes available.

# DMP Assistant Key Features





# Pillar 2: Data Management Planning



✓ Institutional RDM Strategies

✓ Data Management Planning

✓ Data Repository Options

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



## Portage DMP Expert Group

Co-Chairs:

**James Doiron (UofA)**

**Maggie Neilson (AcadiaU)**

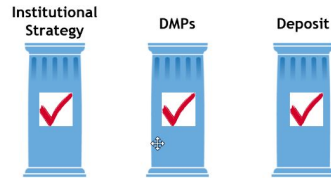
Four working groups:

1. Exemplars
2. Policy
3. Training
4. DMP Repository

## Objectives:

1. Guide the development and growth of the Portage DMP Assistant platform
2. Provide tools that support best practices in research data stewardship and that promote a strong data culture in Canada;
3. Facilitate the sharing of research administrative information across research organizations and agencies;
4. Improve coordination among local and national research service organizations
5. Reduce administrative burden on researchers.

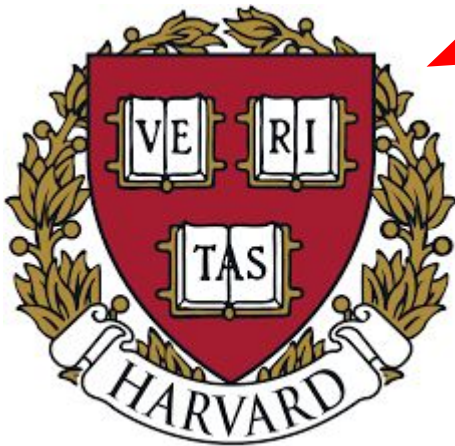
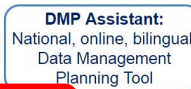
# Pillar 3: Data Deposit



✓ Institutional RDM Strategies

✓ Data Management Planning

✓ Data Repository Options



Dataverse

[User Guide](#) [Support](#) [Sign Up](#) [Log In](#)



UAL Dataverse (Digital Initiatives, University of Alberta Libraries)

[data.management@uofa](mailto:data.management@uofa)

Metrics

23,109 Downloads

[Contact](#) [Share](#)

Welcome to the University of Alberta Libraries' Dataverse network. This service is provided to help researchers publish, analyze, distribute, and preserve their data and datasets.

Search this dataverse...

Find

[Advanced Search](#)

# Pillar 3: Data Deposit

## Dataverse Positives:

Open source software

Mature platform

Widely adopted

Community support

User-friendly

Brandable

*Portage Training Materials in development*



The screenshot shows the Dataverse Project website. At the top, there is a navigation bar with the following links: Dataverse Project, About, Community, Best Practices, Software, and Contact. Below the navigation bar is the Dataverse Project logo, which consists of the text "The Dataverse Project" and a stylized orange icon of three interconnected circles. Underneath the logo is the text "Open source research data repository software". The main content area is divided into three sections, each with a circular icon and a title:

- Researchers**: Represented by a green circle with two white eyes. The text describes enjoying full control over data, receiving web visibility, academic credit, and increased citation counts. It mentions that a personal dataverse is easy to set up and allows for branding on a personal website.
- Journals**: Represented by a blue circle with a white book icon. The text describes seamlessly managing the submission, review, and publication of data associated with published articles, establishing an unbreakable link between articles and associated data.
- Institutions**: Represented by a purple circle with four white human figures. The text describes establishing a research data management solution for a community, federating with a growing list of Dataverse repositories worldwide for increased discoverability.

<http://dataverse.org/>

## UofA Dataverse by the numbers:

~600 datasets

~6000 files

~28,000 downloads

# Pillar 3: Data Deposit

## 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

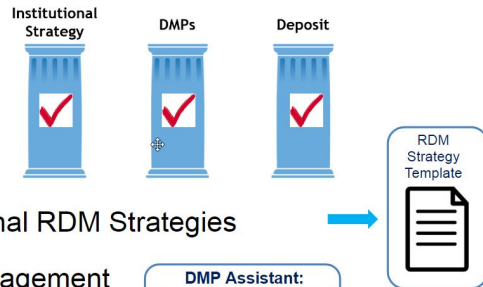
Tabular (CSV, SPSS, R, etc)  
Documentation (pdf, doc, text)  
Geospatial data  
Multimedia (audio-visual)

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

# Pillar 3: Data Deposit



✓ Institutional RDM Strategies

✓ Data Management Planning

✓ Data Repository Options

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



## Portage Dataverse North Working Group

Chair: **Lisa Goddard (UVic)**

Three sub-working groups:

1. Business Models
2. Training
3. Metadata

### Objectives:

- Develop a community of practice that brings together Dataverse providers
- Coordinate and discuss local and national training, support services, outreach strategies, promotions, and infrastructure development and needs.
- Provide Dataverse focused guidance in areas such as data preservation, data discovery, curation, metadata, and training.

# Online RDM Training Resources

Portage Training Resources External Training Resource Library Request Training Assistance

dedicated to the shared stewardship of research data in Canada through:

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New to DMP Assistant? Sign up today.



## 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

# Continuum of Training Materials



**Research Data Management Made Easy!**

WWW.PORTAGENETWORK.CA

**What is Portage?**

Portage is a national research data management (RDM) initiative to assist researchers and other stakeholders through a library-based network of expertise. It is also developing national platforms and services for planning, preserving, and discovering research data. Portage is managed by the Canadian Association of Research Libraries.

**What is the Training Expert Group (TEG)?**

The mandate of the Training Expert Group (TEG) is to produce bilingual (English/French) training materials and resources that are accessible to all. As well, TEG has compiled a library of External Training Resources. TEG is made up of data librarians and RDM professionals from post-secondary institutions across Canada.

## Continuum of Training



**Webinars**

Coming in the future! Potential webinar topics include: RDM 101; DMPs 101; Institutional Repositories; Dealing with Sensitive Data; Data Curation 101; Data Preservation 101; How to Develop an Institutional Strategy; and others.

**On-Demand Training**

On-demand assistance is available to those organizing RDM training on Canadian academic campuses who would like help developing and delivering training and guidance materials in all areas of RDM.

**Presenters:**  
Jane Fry (Carleton U), Carol Perry (U of Guelph), James Doiron (U of Alberta)

**Conference:**  
IASSIST 2019; Sydney, AU

# UofA Libraries RDM & Data Services - Come See Us!

<https://www.library.ualberta.ca/research-support/data-management>

## Research Data Management

**Organize my data**  
How to prepare a data management plan & protect your data

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Why you would share, data sharing tools, metadata & how to get credit

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How to find a repository, prepare your data & submit your data

DMP Assistant    Dataverse  
Get help and contact us  
Events & Workshops

**CONSULT US AT DATA@UALBERTA.CA**

**RDM Best Practices**

**Data Management Planning**

**Metadata Guidance**

**Data Citation**

**Data Preservation**

**Digital Scholarship**

**Maps & Spatial Data**

**Finding/Accessing Data**

### Data Help Request

Use this form to contact the University of Alberta Data Team with any data-related questions. Information on the UA Libraries' data collections and services is available at: <http://guides.library.ualberta.ca/data>

\* Required

What best describes your request? \*

- Help with finding statistics/data
- Help with GIS/spatial/mapping data
- Help with research data management
- Help with LDC Text Corpora
- Other

Please provide your contact name and preferred e-mail address or phone number. \*

Your answer \_\_\_\_\_

Your Faculty/Department, if applicable?

Your answer \_\_\_\_\_

Brief description of the help or information you require. \*

Your answer \_\_\_\_\_

Best day for an appointment if you would like a data consult.







UNIVERSITY OF ALBERTA  
LIBRARIES

# Thank-you

**James Doiron**

RDM Services Coordinator  
University of Alberta Libraries

[jdoiron@ualberta.ca](mailto:jdoiron@ualberta.ca)