



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

CARL Portage – The Journey Continues...



IASSIST

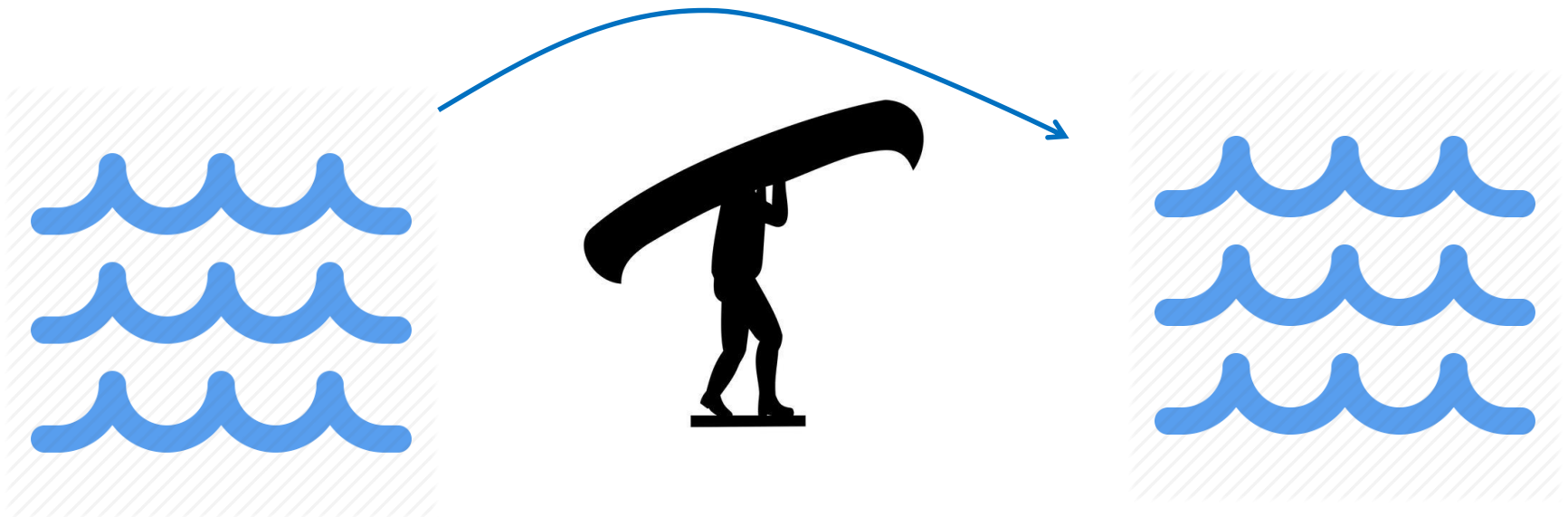
May 30, 2018, Montreal

Jeff Moon, Director, Portage

Lee Wilson, Service Manager, Portage

What is the Portage Network?

“Portage is a CARL-sponsored national network of Research Data Management experts working collaboratively to build capacity and better coordinate RDM activities in Canada”



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**

Collections, Training, Discovery, Preservation,
along with many other reports & resources...

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

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



But there are many other issues with sensitive data



First Nations Data



Métis Data



Inuit Data



General Data Protection Regulation

Four priority outcomes identified...



Deposit-friendly text for ethics applications & informed consent



Data access agreements



Training materials

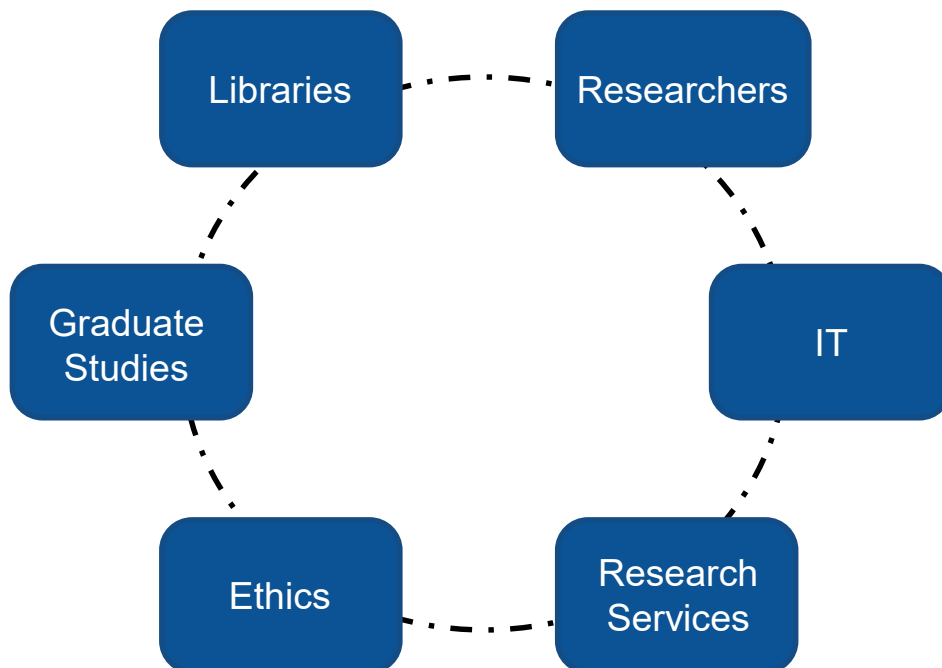


Environmental scan of best practices for Indigenous data

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Levels of Stakeholder Engagement

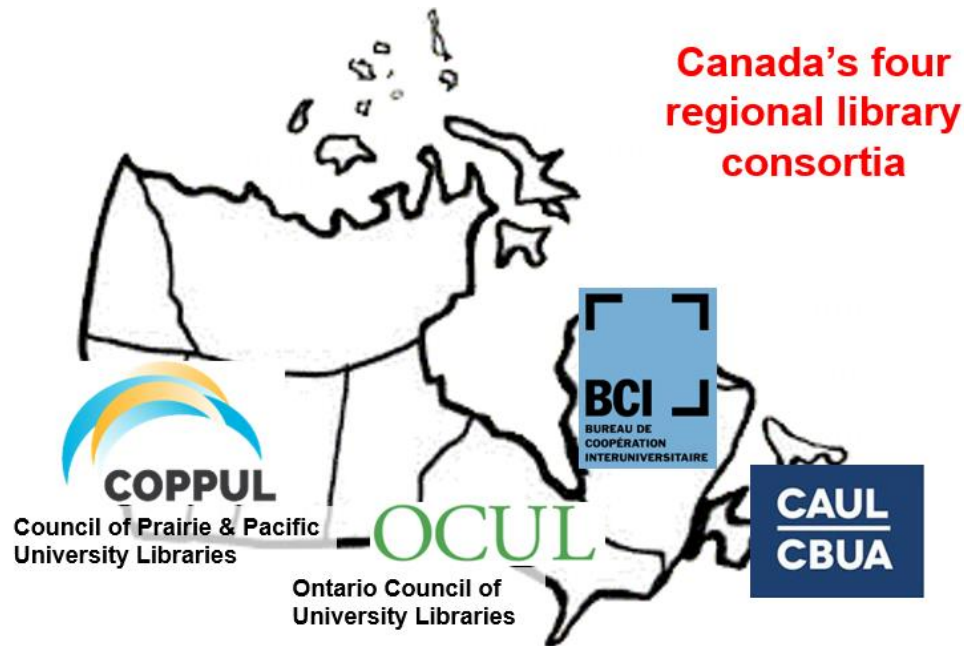
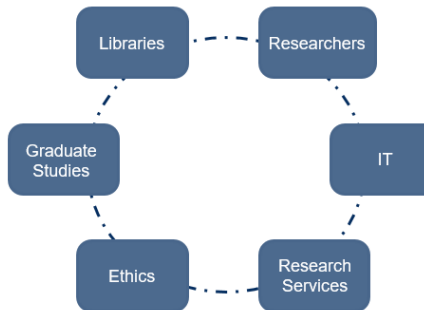


Levels of Stakeholder Engagement

LOCAL

REGIONAL/
PROVINCIAL

NATIONAL

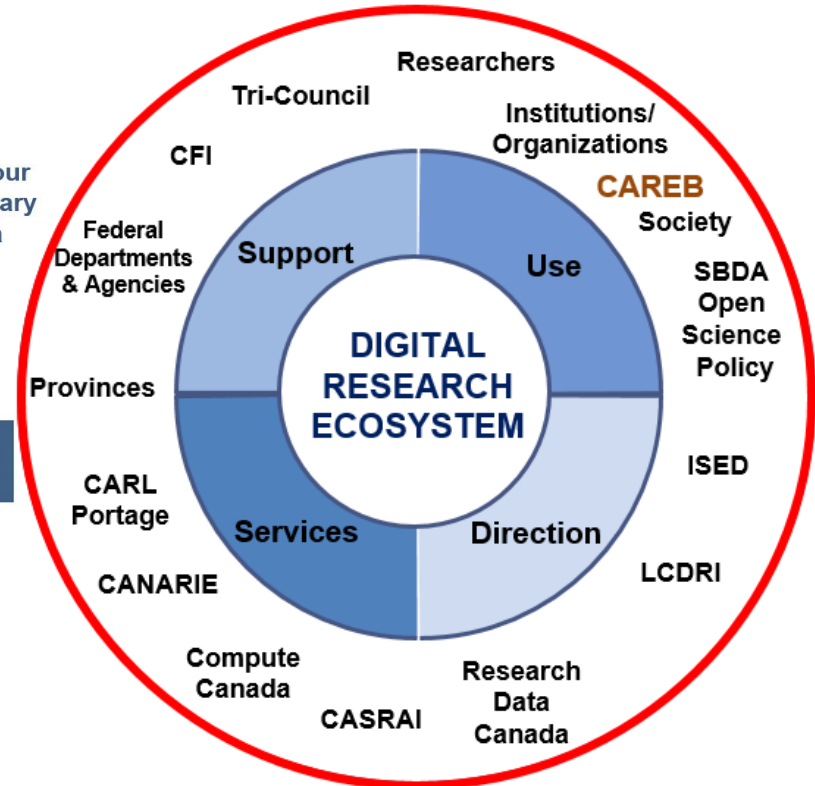
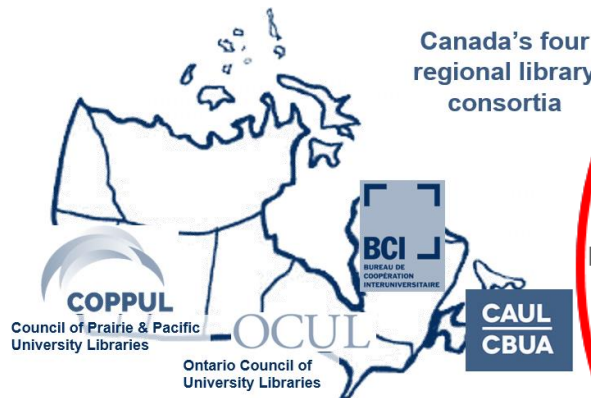
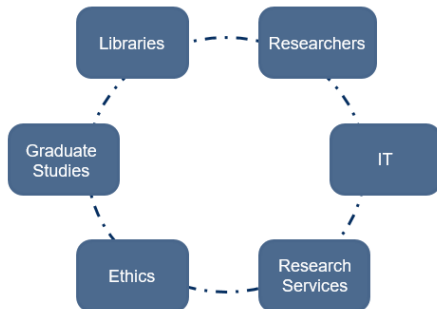


Levels of Stakeholder Engagement

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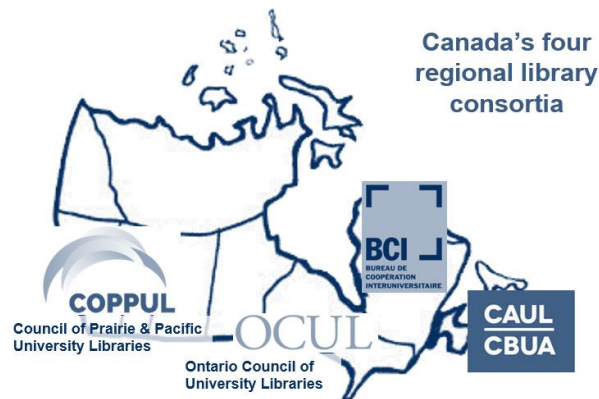
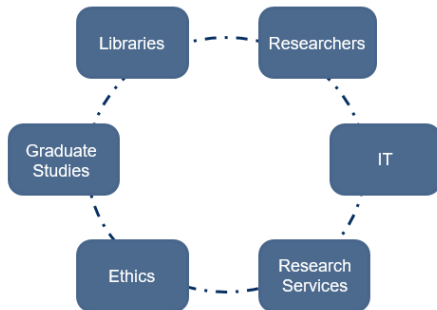


Levels of Stakeholder Engagement

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Researcher's Perspective...



Institutional
Strategy



DMPs



Deposit



Tri-Agency RDM Policy

Researcher's Perspective...



Portage

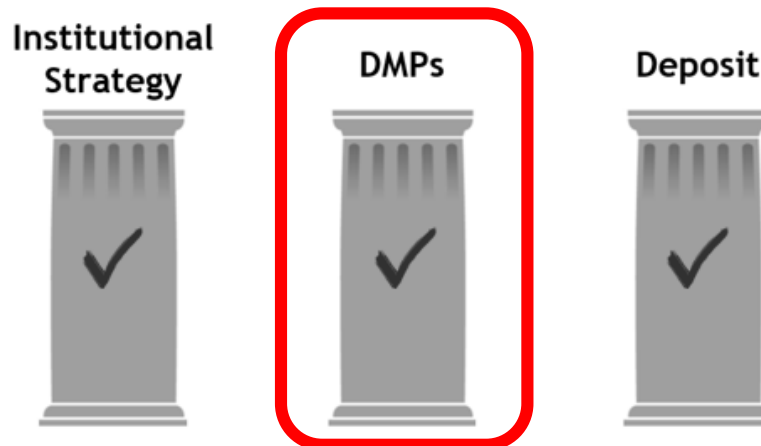


Strategy Components

+ associated guidance

1. **Raise awareness:** about benefits of best practices and emerging policy requirements.
2. **Assess institutional readiness:** to manage and realize the potential of data holdings.
3. **Formalize RDM practices:** through the development and/or adoption of guidelines, best practices, and policies – setting the tone and underscoring institutional commitment and expectations.
4. **Define a roadmap:** to help with capacity-building over the medium term, to ensure research excellence, efficiency, and transparency.

Researcher's Perspective...



<https://assistant.portagenetwork.ca/en>

Portage

DMP Assistant

Sign In

Sign Up

1. **Data collection**
2. **Documentation & metadata**
3. **Backup & storage**
4. **Preservation**
5. **Data sharing & reuse**
6. **Responsibilities & resources**
7. **Ethics & legal compliance**

DMP Assistant 2.0

Coming Soon

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**

DMP Uptake...

*“I suspect *there isn’t that much use* of the DMP Assistant right now... in proportion to the number of researchers, but it’s a **chicken and egg situation**”*

“if it is not required, even though it’s a good practice, not that many will build a DMP”



37 institutional accounts
~3000 registered users

May, 2018

Researcher's Perspective...



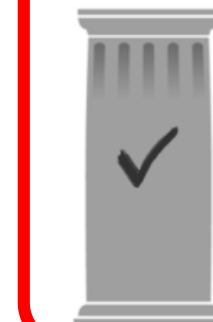
Institutional
Strategy



DMPs



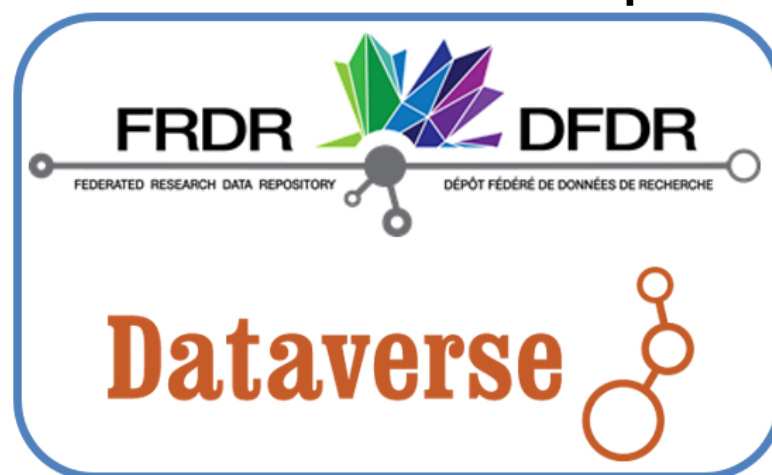
Deposit



Portage
National Repository
Options & Coordination
...along with Domain-specific
Repositories

Federated RDM Architecture

Federated Research Data Repository



Dataverse North



Federated RDM Architecture

Active Storage

Repository Storage

Preservation Storage

Federated RDM Architecture... the Portage vision

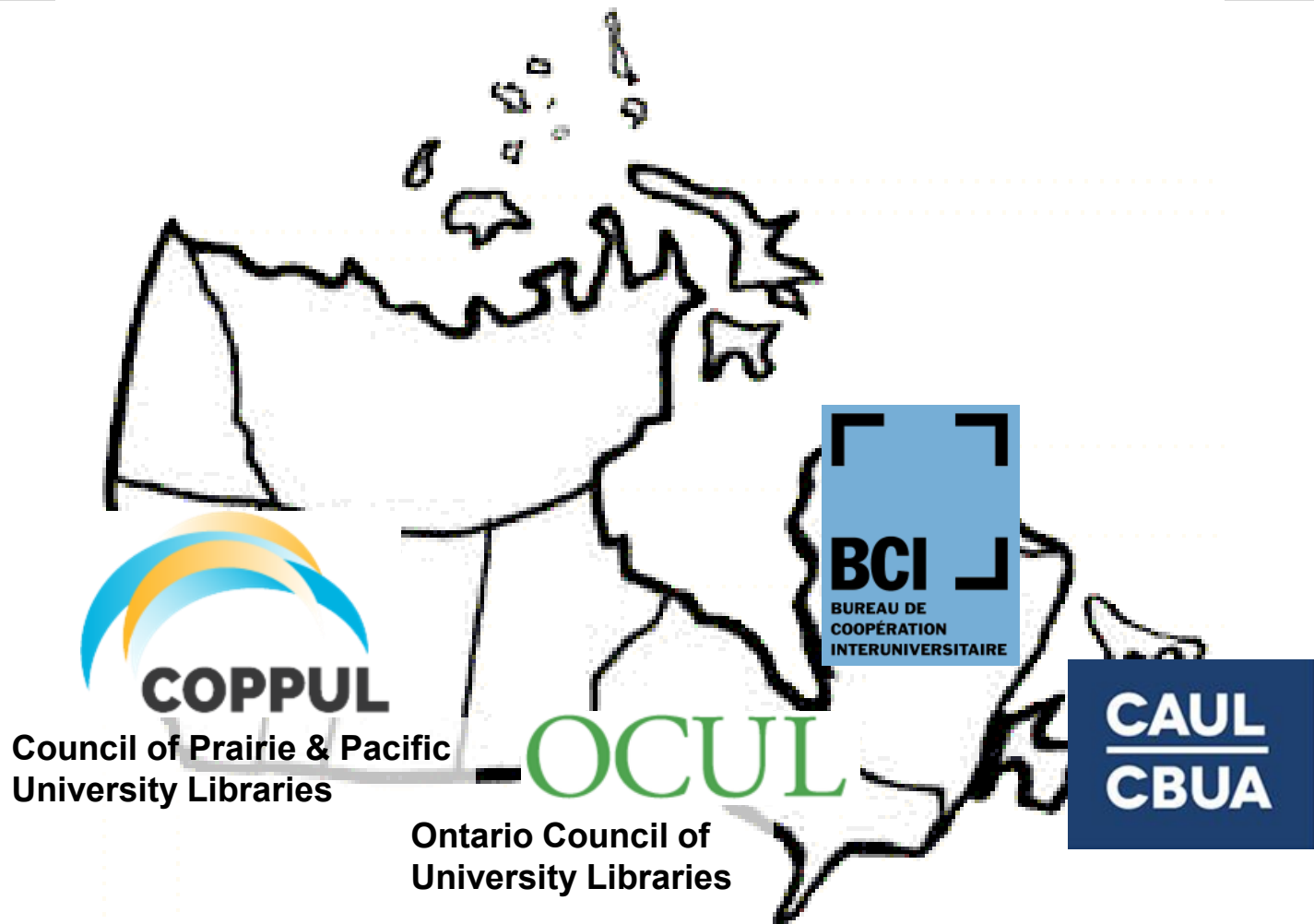


For more on the Portage vision for a

Federated RDM Architecture

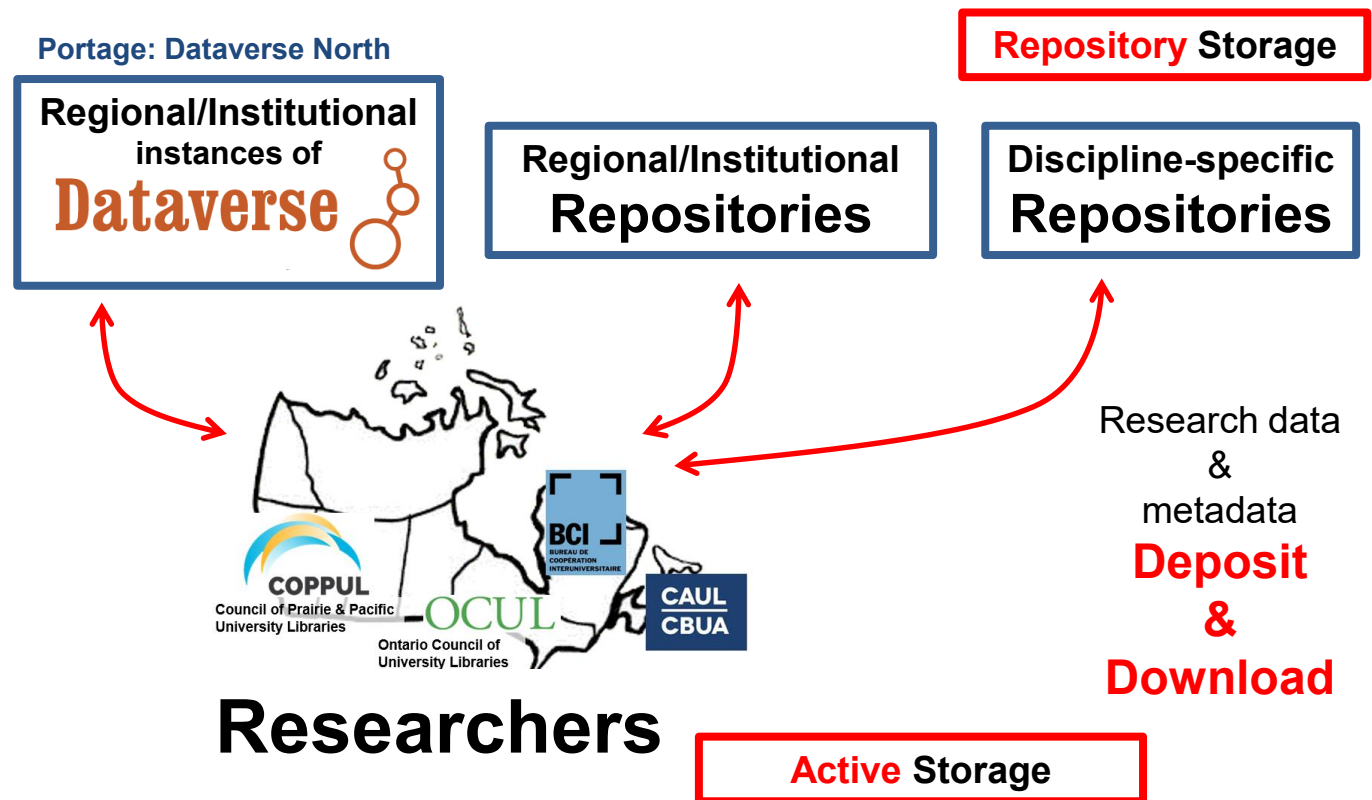
over to Lee Wilson, Portage Service Manager...

Federated Architecture



Researchers

Federated Architecture



Federated Architecture: Repository Options



Main Features:

Mature platform

Widely adopted

User-friendly

Brandable

***Possible National
Repository Option***

**Dataverse used widely in
Canada with 1000's of data
files deposited**

Dataverses at Scholars Portal (OCUL):

Algoma
UNIVERSITY

Algoma University Dataverse



Brock University Dataverse



Carleton University Dataverse



Lakehead University Dataverse



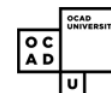
Laurentian University Dataverse



McMaster University Dataverse



Nipissing University Dataverse



OCAD University Dataverse



Queen's University Dataverse



Royal Military College Dataverse



Ryerson University Dataverse



Trent University Dataverse



University of Guelph Dataverse



UOIT Dataverse



University of Ottawa Dataverse



University of Regina Dataverse



University of Toronto Dataverse



University of Waterloo Dataverse



University of Windsor Dataverse



University of Windsor Dataverse



Western University Dataverse



Wilfrid Laurier University
Dataverse



York University Dataverse

... Dalhousie & Abacus

Algoma
UNIVERSITY

Algoma University Dataverse

Brock
University

Brock University Dataverse

Carleton
UNIVERSITY

Carleton University Dataverse

Lakehead
UNIVERSITY

Lakehead University Dataverse

Laurentian University
Université Laurentienne

Laurentian University Dataverse

McMaster
University

McMaster University Dataverse

NIPISSING
UNIVERSITY

Nipissing University Dataverse

OCAD
UNIVERSITY

OCAD University Dataverse

DALHOUSIE 1818
UNIVERSITY 2018

Dalhousie University Dataverse (Dalhousie University)

Ryerson
University

Ryerson University Dataverse

TRENT
UNIVERSITY

Trent University Dataverse

UNIVERSITY OF
CALGARY
PRISM Dataverse

UNIVERSITY
of GUELPH
University of Guelph Dataverse

Abacus Dataverse Network

UBC, SFU, UNBC, & UVic

University
of Regina
University of Regina Dataverse

UNIVERSITY OF
TORONTO
University of Toronto Dataverse

University of Waterloo Dataverse

University of Windsor Dataverse

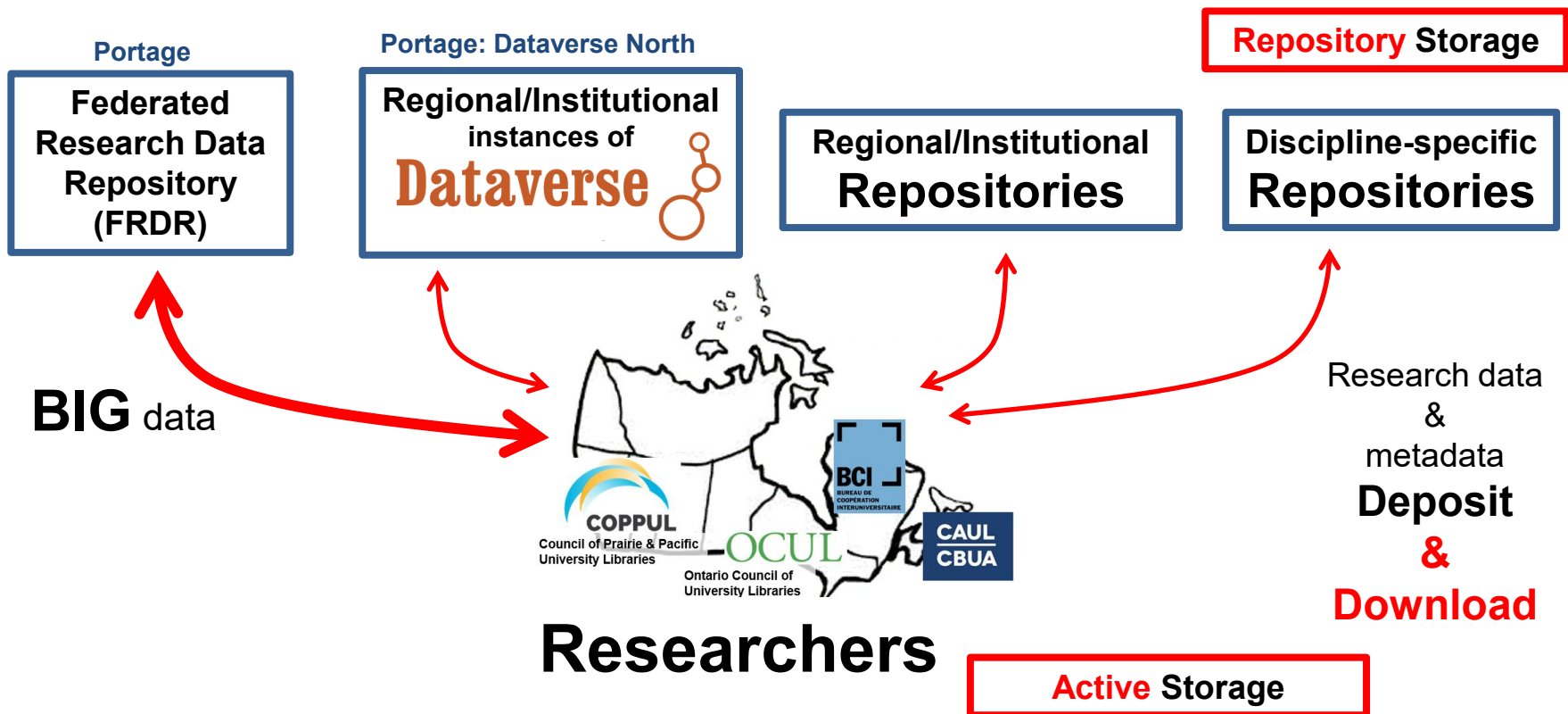
University
of Windsor
University of Windsor Dataverse

Western
UNIVERSITY - CANADA
Western University Dataverse

LAURIER
Inspiring Lives.
Wilfrid Laurier University
Dataverse

YORK
UNIVERSITY
York University Dataverse

Federated Architecture



Federated Architecture: Repository Options



Federated Research Data Repository

Main Features:

‘Big Data’ upload/download

Maintains file hierarchies

National Discovery Platform

National Repository Option

Preservation Processing capacity

Currently in Limited Production

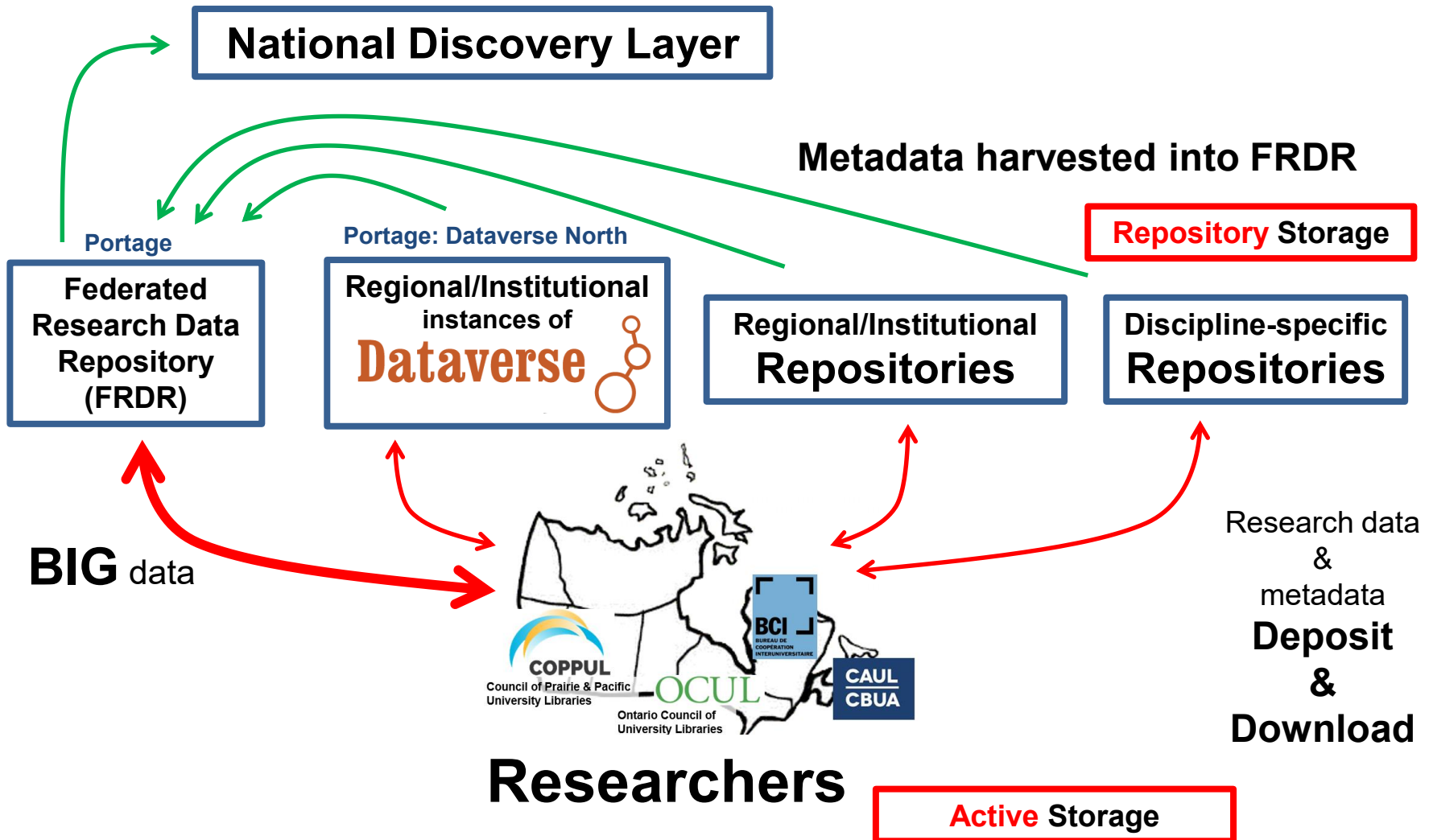
Strategic Relevance

**Fits into broader Portage vision for
Preservation**

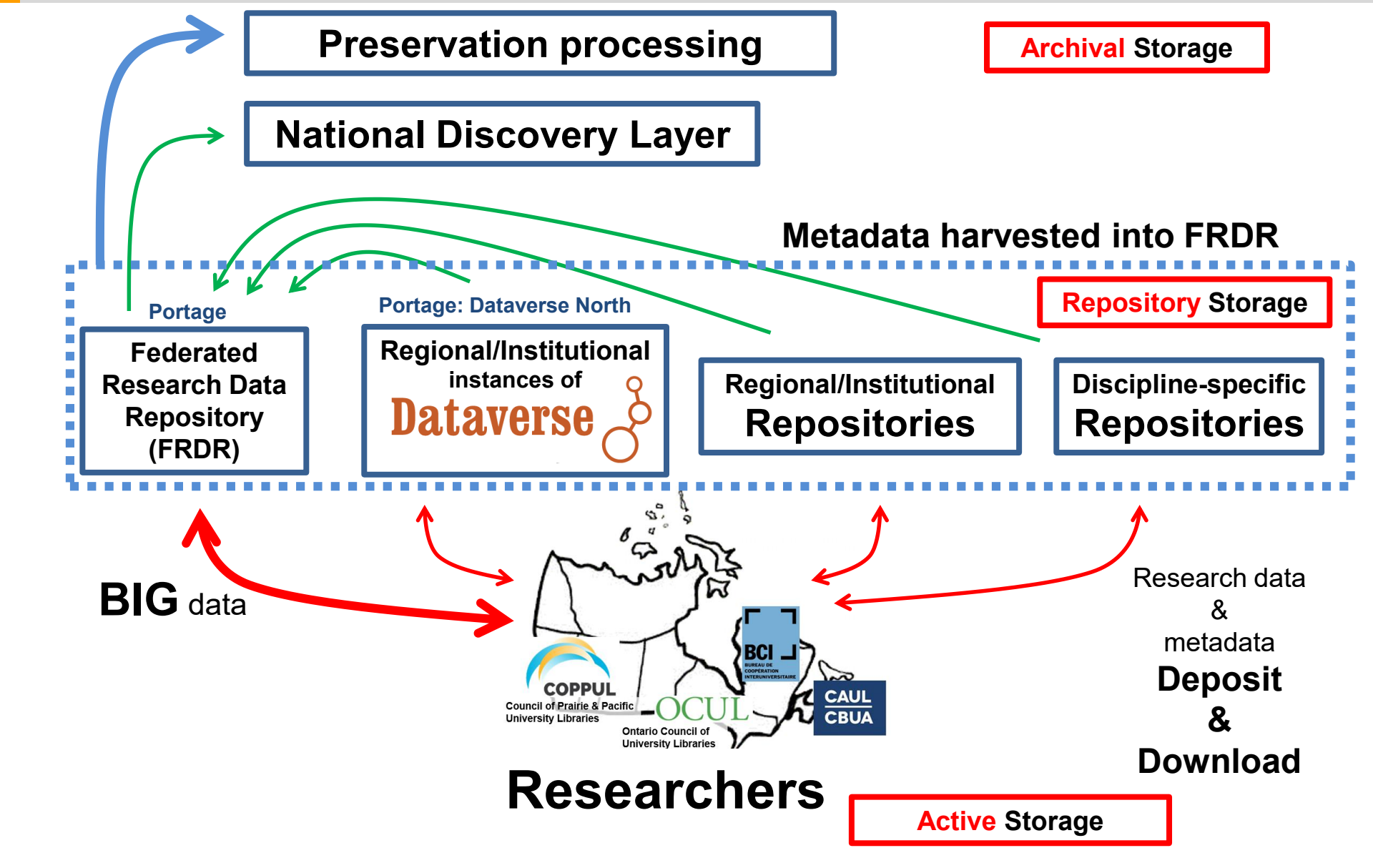
**Strategic partnership with Compute
Canada (HPC/ARC)**

**Fills key gaps in the RDM
ecosystem**

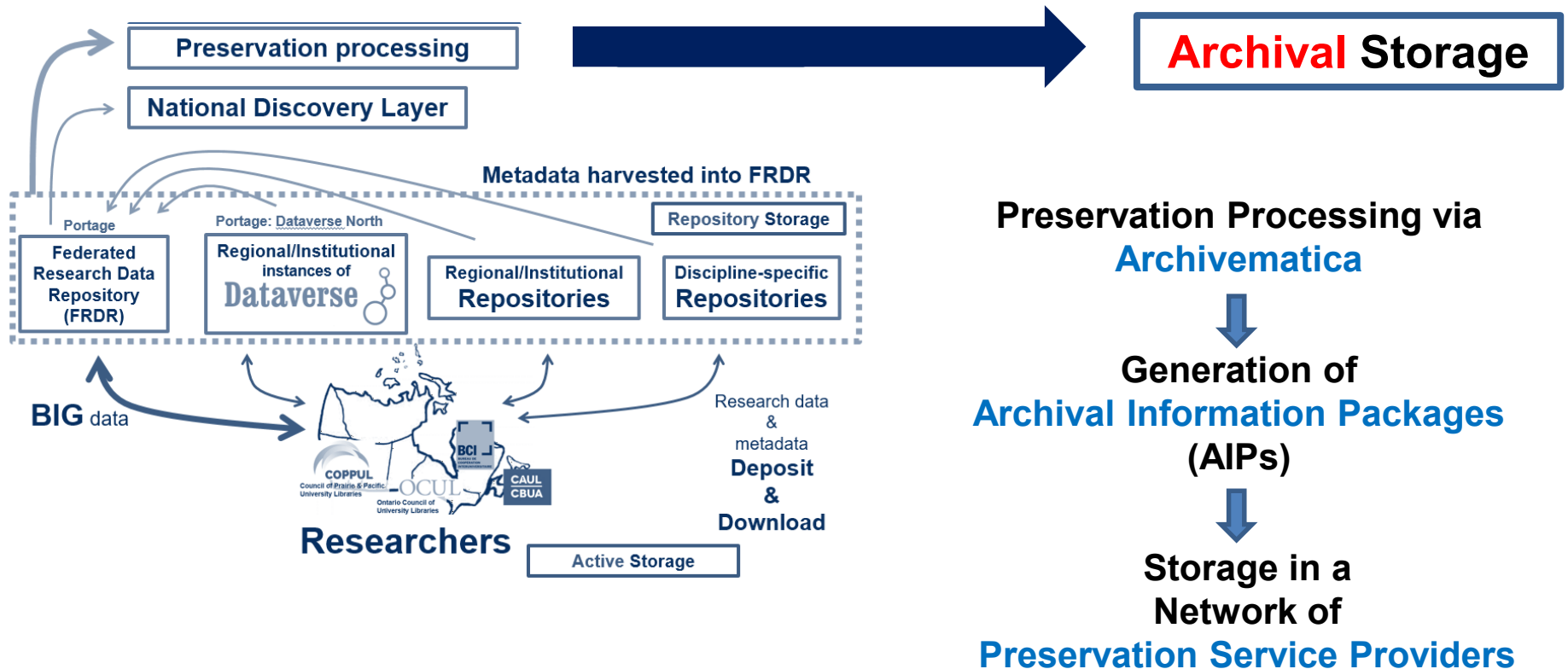
Federated Architecture



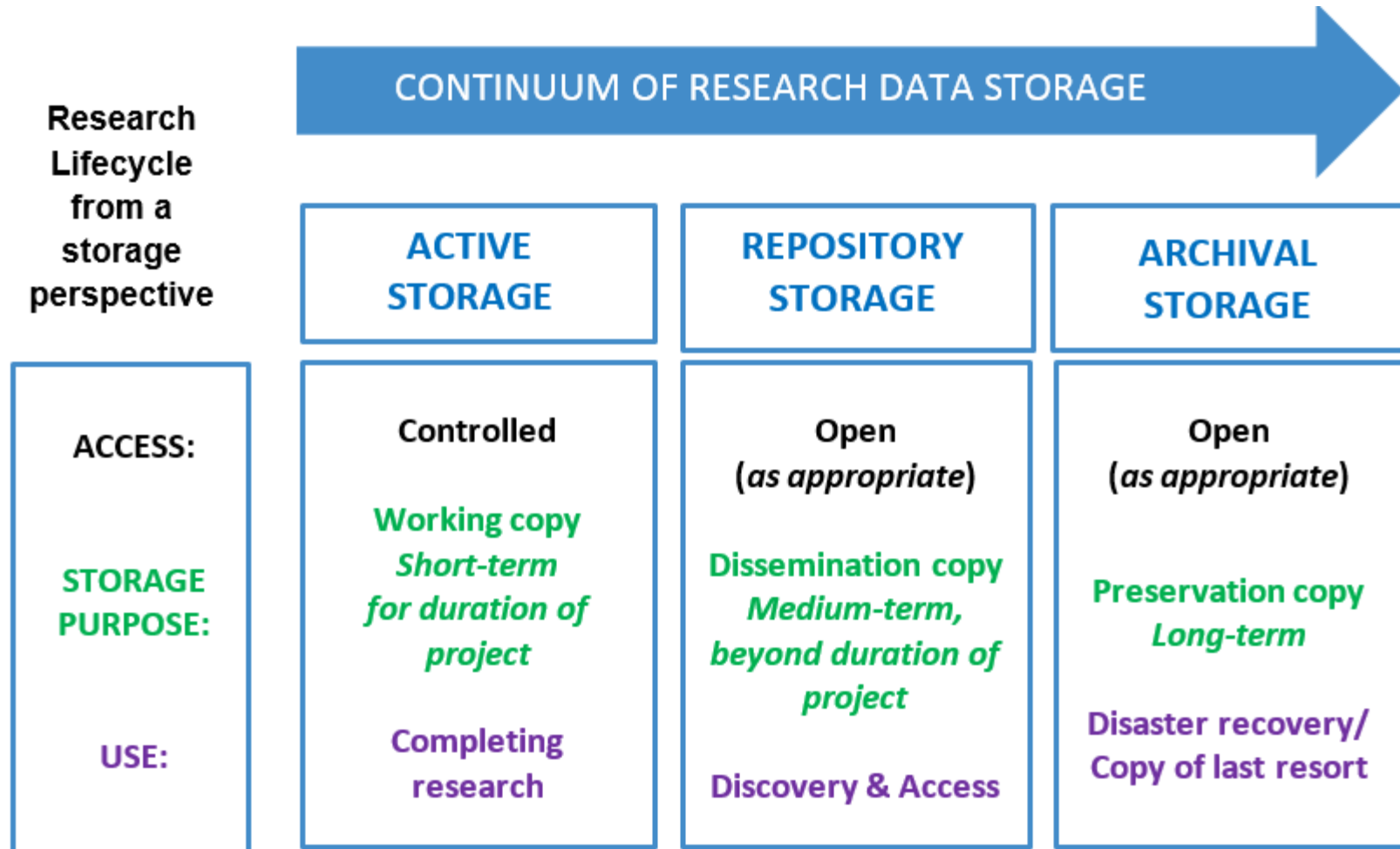
Federated Architecture



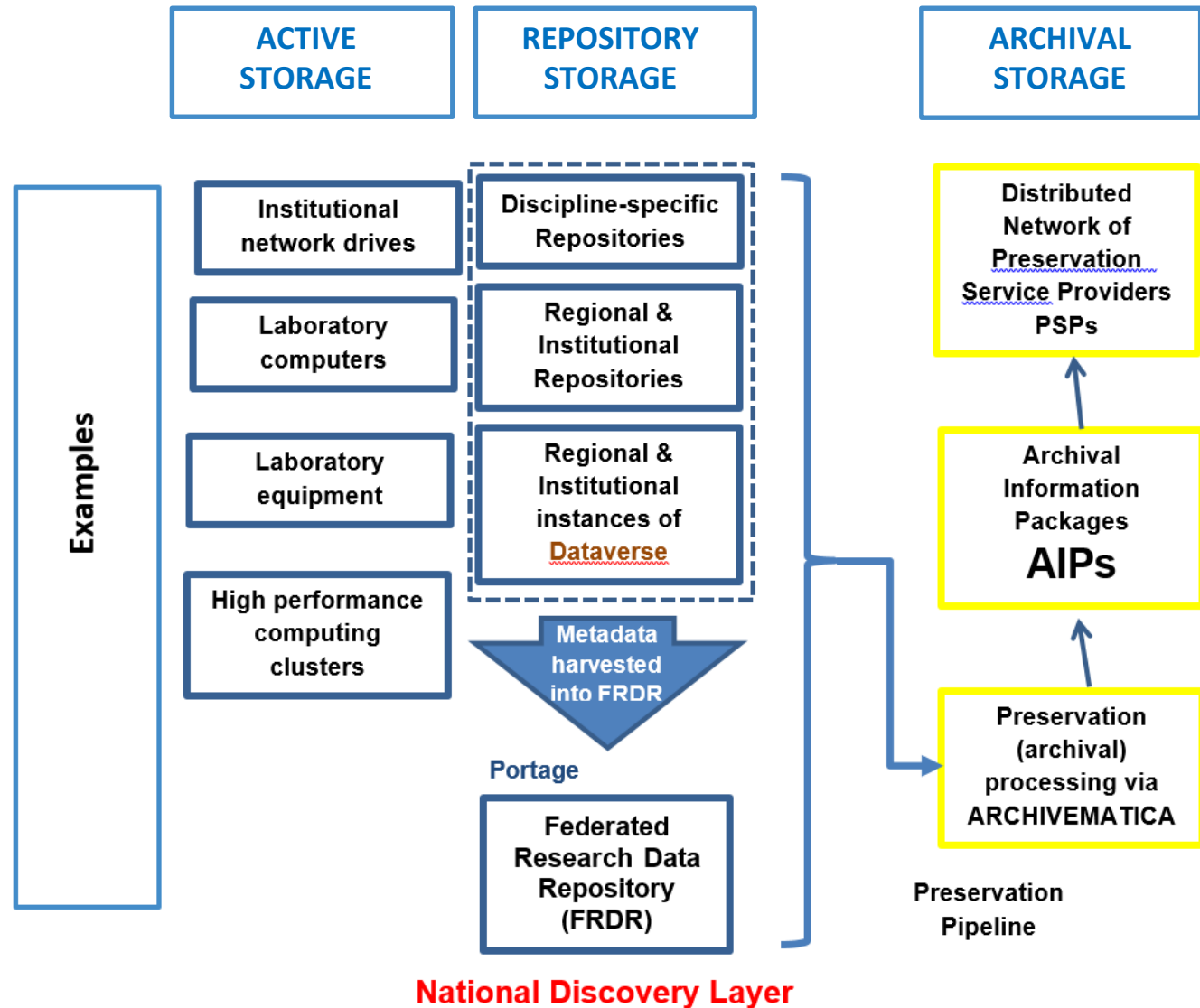
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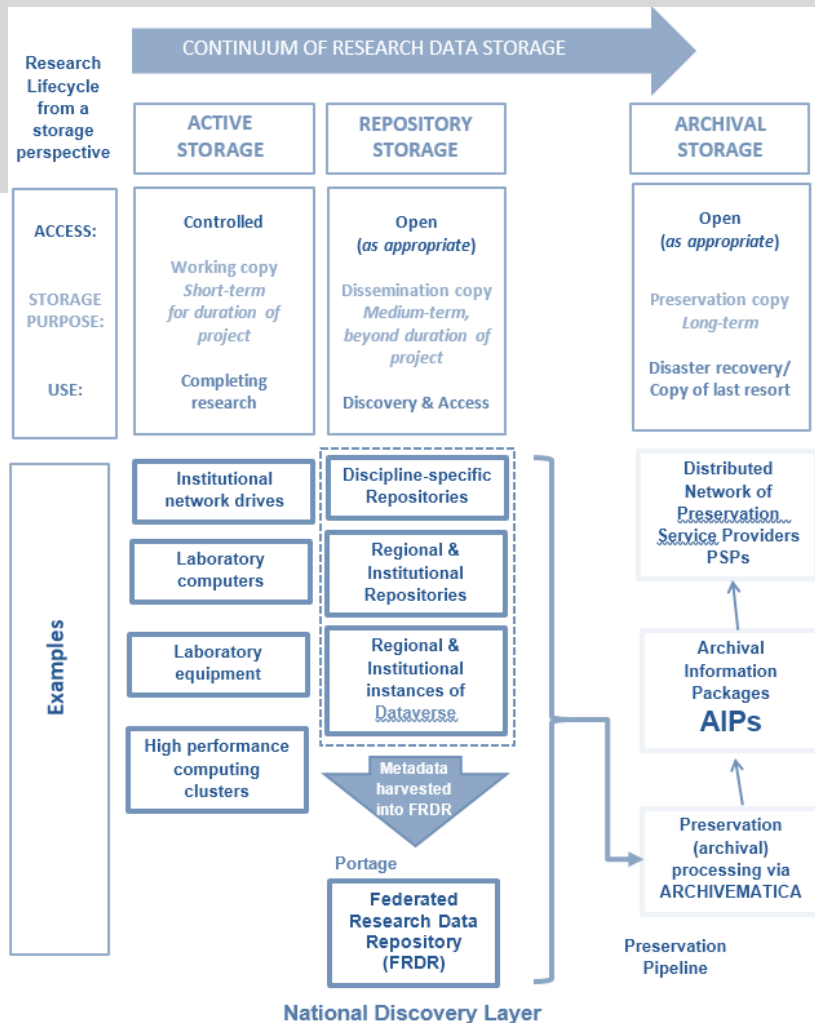
Data Storage Continuum



Data Storage Continuum



Data Storage Continuum



And there are other RDM activities that happen along with 'storage'

DATA MANAGEMENT PLANNING

DATA CURATION

The Story Continues...

- Work with the Preservation Expert Group to create a network of Preservation Service Providers (PSPs)
- Develop a nationally coordinated, regionally distributed network of curation support services
- Build tools and services for “active” data curation
- Implement a geospatial discovery layer
- Integrate Portage services on a single, end-user facing platform

Questions?

portage

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