

IMC Monthly VTC Notes  
May 9th, 2017

## Participants

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## Notes from James Connors

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### UPDATE

Wade Sheldon

2 events at NCEAS last month

1st: continuation of workshop led by Corinna, Margaret and Phillip Tarrant. Operating personnel for data repositories bringing ideas together to start working on papers to communicate ideas and practices. LTER participated in this event. Lots of things going on with data repositories and a lot of things coming out of this group to keep tabs on. Very positive, productive meeting.

2nd: Short meeting kicked off by Peter McCartney as NSF. Bring together EDI principles and DataOne and NCO and a few other reps from IM working groups. Also Peter Groffman (current chair of LTER executive board). Purpose: series of discussions about opportunities for collaboration, areas of overlap across these groups and points of intersect. Discuss how all these groups are going to collaborate on things like data synthesis and other LTER activities. Wade is going to work with Mark Shildhauer to come up with some guidelines for synthesis groups to communicate with LTER IM and NCO about data archiving, services, etc. Need to start collecting feedback from these synthesis groups about data needs. Strong commitment to start using existing data archives as a source of data for these synthesis groups.

Gastil

One outcome that came out of this was another revision of the IM guidelines documentation.

## ANNUAL MEETING UPDATE

Jason Downing

Current count is 19 reps from sites. The first day for the IM meeting is not an official meeting day for ESIP, so shuttles from the hotel are not available. Also, lunch is not available and the cafeteria is not going to be open. Need to figure out something for this meal. Also, need to decide if we do a mixer event on the first night?

Wade Sheldon to find contact at IU for info on these things.

## IM TRAINING WORKING GROUP UPDATE

Steven Earl

At annual meeting last summer in SBC, the idea for an IM training working group came up. Then this working group was formed and has been productive since then.

Is currently producing an IM guidelines document. Looking for some feedback on this from the group and also looking for people to help.

The scope of this document has been refined to focus on LTER IM tasks and skills, instead of general programming and technical needs.

The greatest resource we have is probably other IMs.

Proposing the idea of a mentorship team of 3-5 current IMS who would review all the IM tasks and duties happening at their site and communicate these to the new IMs to give them perspective on the IM things that are happening at current sites. Get overviews of the individual IM systems and see how it's done in different ways and what's in common.

New IMs could then identify a current system that seems most in line with their needs and requirements and then could possibly set up visits, etc.

Not going to get the chance to meet in person as often as we have in the past.

Second part of the document covers very specific skills and tools, e.g. generating EML, interfacing with PASTA, developing local catalog, database administration, soliciting metadata, interactions, systems security, etc.

Started to identify people who might be best contacts for certain topics above.

## DISCUSSION

Hap

Would be nice to see how all the sites are doing things.

Stace

At the in-person meeting in July, it would be nice if the new sites could present what their plans for IM are and get feedback from the group.

Margaret

The data management plan for each renewal proposal is going to be different because requirements and needs change over time.

Marty Downs

Could we assign some categories of how sites manage their data and get feedback/contributions from site IMs.

Corinna

Maybe we could just start doing virtual meetings that have a specific topic for each category and discussing how the sites do these different things.

Rob

It would be very helpful if the new site IMS could present their current plans and get some feedback right away, before we start doing these discussions

Gastil

When I first started I interviewed all the site IMS about things like this and documented it. Can provide as a resource if that would be helpful.

John Porter

Looking at the information management plans in the proposals is a good idea since they're condensed to around 5 pages. In the IM training working groups we started discussing the general categories of IM system approaches. Matching up needs with these overviews would be a good way to get started for the new IMs.

Suzanne

In favor of what Marty Downs proposed about categorizing elements of IM systems and getting documentation from the sites. Still have questions about how the other sites operate, and these types of discussions would be helpful in addition to the high-level planning that usual happens during the IM meetings.

Wade

In the late 2000's, Inigo led a project to document technology implementations. Maybe we could use this as a starting point and we could update and refine this.

Steven Earl

We're hearing that the new site IMs would like some immediate feedback about their data management plans, correct?

Stace

Yes.

Rob

Yes, both ways. New sites getting feedback on their plans would be helpful as well as existing sites implementations.

Mark Shildhauer

Would be useful for existing IMs to provide some feedback on "if you could start over with your current knowledge, how would you do things different?"

Hap

What about how much work new sites should start putting into local sites and portals.

Wade

Starting to hear that NSF is in favor of moving away from local portals and sites, but there's tension with scientists about the specificity and detail that local systems provide.

Gastil

One session at ESIP is going to be a demonstration on how to build a local view into DataOne or PASTA as the site's local data portal

John Porter

There are other challenges, though, like storing metadata, documentation and all the other things and producing EML for archiving. So all the components that go into producing the endpoint archiving product. There are some general approaches that can be described.

Rob

Are there any resources for understanding all the systems that are used and interacting in LTER and how they connect and interact with each other?

Corinna

Yes, this high-level documentation is something that is missing. A high-level, abstract overview of these things would be very valuable and doesn't currently exist.

Steven Earl

How and when could we start this two-way sharing of existing IM systems and the new, proposed IM systems?

Gastil

We'd need a lot of time for this, and could be started at annual meeting but not finished.

Corinna

EDI is welcoming feedback about how often, how much and what types of formats would be most useful for starting to share this information and interact with each other. We need to start trying to organize these training sessions and getting feedback and honing this process.

Suzanne (EDI)

EDI is going to start producing a newsletter. It would be good to get feedback about what sort of training material would be helpful to include. The plan is to begin this on a weekly schedule with the ability to replay or revisit certain topics and tutorials.

## Notes from Suzanne Remillard

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### April Events at NCEAS (Wade)

1. Continuation workshop (Corinna, Margaret, Phillip) on data repositories and how to better coordinate. The product will be some short papers.
2. Another short meeting; LTER collaborations that P McCartney kicked off; principals of EDI, DataOne, LNCO, IMC (Gastil, Wade), Peter Groffman. Series of discussions related to opportunities to collaborations, missing pieces in the overlap and points of intersections of the various groups in area with common stake (like synthesis). No strong, fast conclusions; good exchange. Follow up work: Wade to work with Mark Schildhauer at LNCO to create a doc about how the synthesis WG approach finding data and the missing piece is to learn from synthesis groups about data discovery and utility. Data archives for source of synthesis activities, but doesn't cover all basis. What's the best way when they can't find what they want?

## July Meeting Preparation (Jason D.)

19 people signed up so far; some people still looking for roommates. Should we select a hotel and stay centralized?

Shuttles aren't working on the first day; we will need to find a solution. Cafeteria is shut down on first day; still deciding what to do (on own or catered). Do we want a mixer event on Monday PM?

## Training Recommendations (Steven Earl)

Members: Steven, Kristin, John Porter, Jonathan Walsh

Encouraged from questions by LNCO about helping new sites coming in.

Feedback on document; what's right, what's wrong, what's missing?

Scope: Challenging to ID the full suite of training, therefore relates to those things that are very specific to LTER IM.

Focus is on new IMs. But this field is changing fast and current IM's may also need to acquire new skills. The survey a few weeks ago about training needs went into this process.

Approaches: Community centric. The greatest resource is others IMs. Proposed mentorship (3-5 current IMs) who would review all info at their site and convey to new IMs. Determine how the pieces come together to create an IMS. Another approach, or second step, would include a site visit if there is a site that has a similar system.

Modular Training Skills: Documents the types of skills that an IM may need.

## Discussion:

Hap: What are sites currently doing?

Jim: would like to see what other sites are doing.

Stace: would also like to share what she wrote and see if it will work.  
All new IMs are going to ESIP so we could discuss this at the meeting.

Margaret: DMP may not necessarily be current, but she has a long version.

Marty: Can we assign categories to collect this information?

Corinna: Agree, don't waste meeting time, but brief summaries.

Jim:

Gastil: propose to do this next month; a continuation of training topics

John P: compressed plans isn't a bad thing. There are multiple ways to do things and new IMs need to find what matches best.

Suzanne: Inigo's information in 2000's. More detail than DMP; gets at actual technologies employed. It would be beneficial to update this matrix.

Wade: Agree, in late 2000's Inigo had a technology matrix and we should update this. We had a tradition of doing Site Bytes for the annual meetings which covered these areas. We should do this again this year.

Stevan: But new sites are asking to present their DMP and get feedback, which is different than sharing other site approaches.

Rob: would like to participate both ways, technology matrix and share his approach to get feedback. They are at the beginning; funding doesn't come until they fall and they can still tweak their plan.

Jason: Would like to hear new sites systems; there are probably 25 different approaches; can we find a few approaches that are similar to the new sites?

Mark Schildhauer: This group has a lot of collective experience. If asked, if starting today, what we would do?

Hap: Is wondering if sites are moving away from displaying data on their own site versus EDI?

Wade: Peter McCartney (NSF) is clear that we should move away from individual site portals. But we're getting mixed messages. Sites are used to their local systems. There is more specificity locally versus at these large data centers.

Marty: The demand for data on local websites is not coming from NSF.

Gastil: At meeting a topic will be on data display based in skinning. Local view of central repository. Uses DataOne or PASTA.

Corinna: If starting from scratch, would not have sites get used to custom situation. Get them used to PASTA directly.

Gastil: Better use of resources to invest in something that works for more things (like PASTA).

John P: Agrees, but only solves half the problem. Don't need a system to store the EML, but creating the EML is where the challenge is. This is done in a variety of ways.

Rob: Can IMC point him to resources about PASTA, DataOne, EML, etc. It's key to link to these systems for the new sites.

Corinna: Agrees. This part is missing from the training document. What is already out there and what are sites using? What is DataOne, PASTA, EML, EDI, etc.?

Stevan: Seems like we need multiple approaches. If we don't do this in person, how do we do this?

Gastil: An hour may not be enough, but we will target this for the next VWC.

Corinna: What do the new sites want? EDI is happy to help with training. Could be a series of short presentations, weekly, monthly. Short and quick.

Gastil: Combination would work.

Suzanne: Thinks it's a good idea.

Corinna: Will try it out and see how it works. They want input on what to target and feedback on how things work.

Susanne C.: Will be putting out a newsletter this week regarding EDI training plans, for example creating EML with R. Please review the ideas and provide feedback.

Stevan: Will the EDI training program facilitate interaction with IMs (new and current)?

Corinna: Yes, training and discussions alternately will be used for interaction. They will do topics according to what is requested.

Gastil: As a general rule, the IMC or LTER doesn't prescribe a system. We design and adjust as we go.

Next VWC to share DMP and describe our systems.



