



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

# Collaboration and Platform Integration in Support of a Federated Research Data Management Service in Canada

Donna Bourne-Tyson, President, Canadian Association of Research Libraries (CARL) / University Librarian, Dalhousie University

Lee Wilson, Portage Service Manager / AceNet RDM Consultant

Corey Davis, Digital Preservation Network Coordinator, Council of Prairie and Pacific University Libraries (COPPUL)

# About Portage

Portage is a national RDM network launched by the Canadian Association of Research Libraries (CARL) in 2015 that coalesces initiatives to build RDM capacity and infrastructure with libraries.

## 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 Network of Expertise

## Six Expert Groups, with associated working groups

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

**A number of additional working groups, including:**

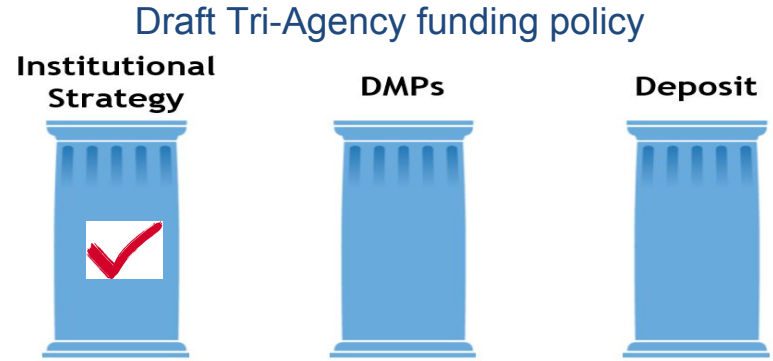
- Dataverse North WG
- FRDR Service Model WG

**And two more coming...**

# Portage Network of Expertise

## Two New Working Groups

- **Portage Institutional RDM Strategy Working Group**, aims to develop a *generic template* for institutions to build upon in response to the first pillar of the anticipated Tri-Agency funding policy.
- **Portage Ethical Treatment of Sensitive Data Working Group**, will help Portage frame and develop resources and supports for researchers around this key data management issue.



# **DMP Assistant and FRDR**

# DMP Assistant ([www.assistant.portagenetwork.ca/](http://www.assistant.portagenetwork.ca/))

**portage**

Shared stewardship of research data

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The DMP Assistant is an online, bilingual, data management planning tool that will help researchers create their own data management plans.

Sign in



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

Sign up



Are you 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.

# What is FRDR?

**FRDR = Federated Research Data Repository (DFDR en français)**

*A scalable, federated platform for digital research data management and the discovery of Canadian research data*

Discovery

Storage

Preservation

Curation

# Discovery

FRDR's harvester indexes data repositories across Canada to make research data held in many repositories discoverable from a single platform

- Currently harvesting 31 repositories (roughly 125,000 datasets discoverable)
- Supports OAI-PMH and CKAN endpoints
- Metadata can be crosswalked *or* adv. search facets provided

**Goal:** supplement existing repository sites and improve discovery

- Breakdown repository siloing, avoid being “just another repository”



# Storage

- A place for Canadian researchers to deposit large datasets
  - Big data transfer using Globus File Transfer
- A place to deposit datasets if researcher does not have a local option
- Designed for scalability
- Storage may be distributed regionally or managed centrally through infrastructure providers (e.g., Compute Canada)

# Preservation Processing

- Archivemata integration: Preservation processing for long-term usability of datasets
- Automatic Archivemata processing for datasets up to 300 GB or 25,000 files
- Archival Information Packages (AIPs) transferred to Preservation Service Providers for long-term storage
  - E.g., Ontario Library Research Cloud (OCUL) & COPPUL's Digital Preservation Network

# **Dataverse North and preservation**

# Dataverse North Working Group

- A Portage Working Group with 26 members from across Canada
- A **community of practice** to coordinate training, support services, outreach strategies, promotions, and infrastructure development
- Explore **nationally coordinated strategies and services**



# Dataverse North goals

- Provide **equitable access** for Canadian researchers
- **Standardize services** across Canada
- **Support users** (librarians and researchers)
- Guide **feature developments and integrations**



# Dataverse North strategic priorities

- **Business Models**
  - Develop a framework for hosting and support services
  - Explore a common business model
- **Training**
  - Identify and coordinate training opportunities
- **Metadata**
  - Recommendations for templates, data files, and DOIs



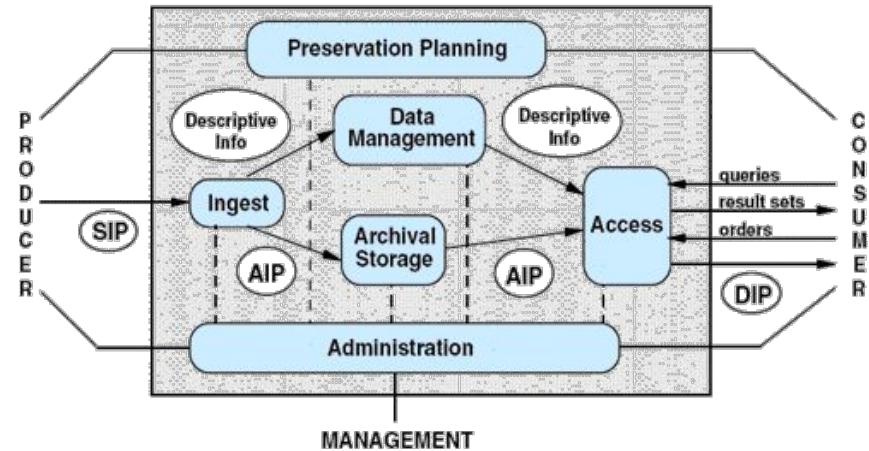
# Dataverse North strategic priorities, phase 2

- **Preservation services**
  - Connecting Dataverse infrastructure to Archivemata and preservation storage services
- **Advocacy and promotion**
  - Identified as a major issue in a recent survey



# Portage Preservation Expert Group (PEG)

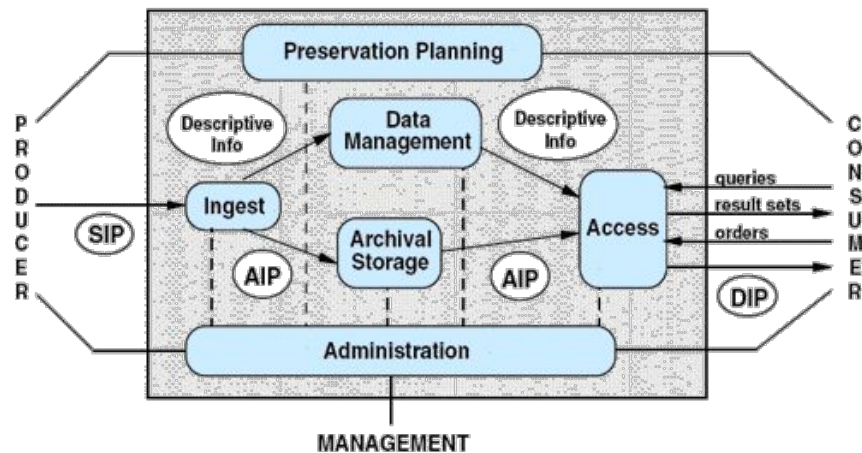
- Portage is dedicated to building a national research data preservation infrastructure through a disaggregated service model
- In this model, preservation functions are broken apart into **separate services distributed over various locations or multiple organizations**
- Archival/preservation storage (and related services) will be outsourced to other organizations who have the capability and experience





# Disaggregated preservation service model

- Portage keeps abreast of the changes in the external environment and implements strategies that can help to mitigate risks
- Portage will coordinating activities between between participating organizations (**Preservation Service Providers**)
- It will **prescribe a set of basic preservation requirements for each PSP**
- Full details will be made available in early 2018 in a Portage whitepaper (see [IDCC abstract](#) for basic details)

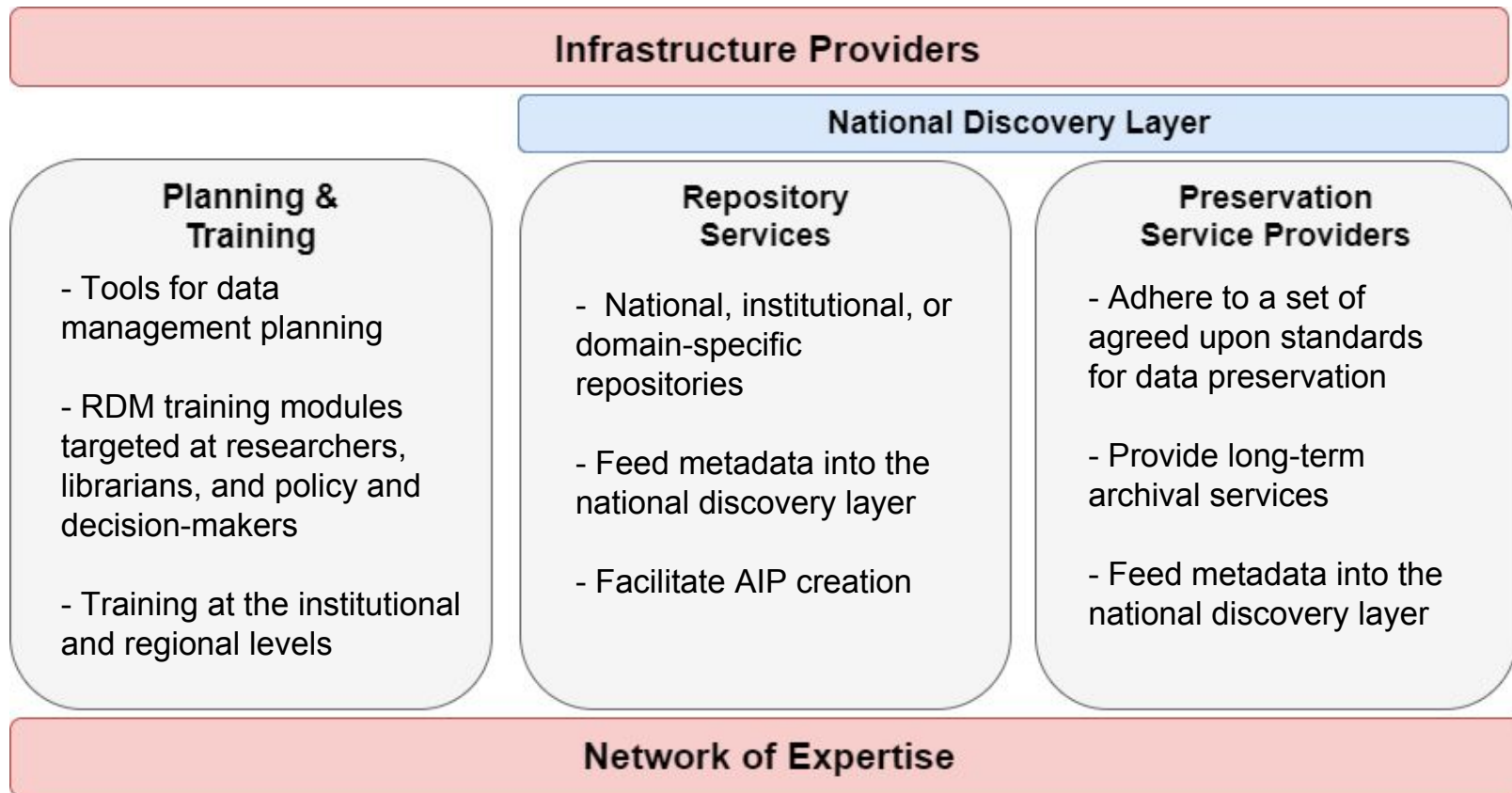


**Bringing it all together**

# Vision for Canadian RDM Services

We envision seamless, equitable access to RDM platforms and services for Canadian institutions and researchers

# Vision for Canadian RDM Services



# Vision for Canadian RDM Services

## Infrastructure Providers

### National Discovery Layer

#### Planning & Training

**portage**

DMP Assistant



**RDM  
PRIMER**

#### Repository Services

The **Dataverse** Project



**slandora**

**archivematica**

#### Preservation Service Providers

**COPPUL** | Council of Prairie and Pacific University Libraries

**OCUL**  
Ontario Council of University Libraries

**BCI** BUREAU DE COOPÉRATION INTERUNIVERSITAIRE

**CAUL  
CBUA** Council of Atlantic University Libraries  
Conseil des bibliothèques universitaires de l'Atlantique

## Network of Expertise

# Next steps

- Integrating services on a single, end-user facing platform
- Defining business and service models for national RDM services
- Securing sustained funding for RDM in Canada
- Facilitating funders' RDM policy development and implementation

# Questions?

