The “what, why and how” of RDM and Dataverse at the Dalhousie Libraries
A LONG TIME AGO...

We didn’t have a research data repository. And that was okay (...or was it?)

We knew that policies and procedures were being developed by the tri-agencies. We also knew that journals were implementing data policies.

Even though there were other repositories available – we chose to implement our own version of Dataverse because...

1. We could!
2. It is an established software used nationally and internationally and is specifically for research data.
3. It can be branded for Dalhousie and by individual users
4. It’s a great community to work with, open to feedback and suggestions.
WHAT IS DATaverse

• A free open source web application
• Developed by the Institute of Quantitative Social Science (IQSS) at Harvard University
• Designed specifically for research data
• Platform to contribute, share, preserve and find data.
THE DAL DATAVERSE TEAM

The RDM Team (not just Dataverse) includes:

• Sarah Stevenson – AUL Research Services
• Erin MacPherson – Research Data Management Librarian, MacRae Library
• Jason Flynn – Systems Administrator (Dataverse)
• And we also work with:
  • Margaret Vail & other ATS staff
  • Lee Wilson, Portage
  • Dalhousie Research Services
  • Senior Administrators within the Libraries and Dalhousie

We participate in:

• CAUL Digital Preservation & Stewardship Group (Sarah)
• Portage - Dataverse North Working Group (Business Models Group) (Erin, Jason)
• Portage - Preservation Expert Group (Michael)

…and we are growing!!!
SERVICES OFFERED BY THE DALHOUSIE LIBRARIES

- Data management tools
- DMP Assistant
- Data repositories
  - Dataverse (Dal)
- Information Resources / Workshops / etc
  - Video tutorials
  - RDM LibGuide
- Bootcamp, OA week, training sessions

HOW DID WE DETERMINE AND DEVELOP THESE SERVICES?

Project Charter for RDM @ Dal:
Charter comprised of Workplan and Task Lists
Dataverse implementation Task List

Collaboration & Networking
Communication with other institutions – in Canada & North America – also looked at practices in the UK, Europe and Australia
CASRAI connect – Portage launch in Oct 2015 (Sarah)
RDAP Summit – 2016 Sarah, 2017 Margaret
Dataverse Community Meeting – June 2017 Erin & Jason
Research Data Management Project Charter

SECTION 1. PROJECT OVERVIEW

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Research Data Management Services at Dalhousie University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brief description</td>
<td>To support faculty and researchers in meeting the proposed data management requirements of the Canadian tri-agencies.</td>
</tr>
<tr>
<td>Project Lead</td>
<td>Sarah Stevenson Phone: 902-494-1325 Email: <a href="mailto:Sarah.Stevenson@dal.ca">Sarah.Stevenson@dal.ca</a></td>
</tr>
<tr>
<td>Faculty of Agriculture Lead</td>
<td>Erin MacPherson Phone: 902-893-3296 Email: <a href="mailto:Erin.MacPherson@dal.ca">Erin.MacPherson@dal.ca</a></td>
</tr>
<tr>
<td>Date</td>
<td>August 26th, 2016</td>
</tr>
<tr>
<td>Version</td>
<td>1.4</td>
</tr>
</tbody>
</table>

SECTION 2. PROJECT BACKGROUND

Development of research data management (RDM) services at Dalhousie University is necessary due to a number of emerging external and internal factors. External factors include a proposed national policy from funders NSERC, SSHRC and CIHR, which released a draft policy July 2015. The Draft Tri-Agency Statement of Principles on Digital Data Management will have a direct impact on impact faculty and researchers as they cover the agency RDM expectations and outline the responsibilities of researchers, research communities, institutions and funders in meeting these expectations (Government of Canada, 2015).
# Dataverse Implementation task-list

<table>
<thead>
<tr>
<th>Task</th>
<th>Priority</th>
<th>Status</th>
<th>Responsibility</th>
<th>% Complete</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dataverse testing and configuration of v. 4.6</td>
<td>Normal</td>
<td>Deferred</td>
<td>Erin</td>
<td>100%</td>
<td>We decided to move to the latest version of Dataverse to have the best support for our researchers (ie. Handle vs. doi, etc)</td>
</tr>
<tr>
<td>DOI agreement signed with Datacite</td>
<td>High</td>
<td>Complete</td>
<td>Erin/Donna</td>
<td>100%</td>
<td>Done. Donna/Janice have the agreement, and Erin has a copy in her files also.</td>
</tr>
<tr>
<td>Dataverse terms of use approved by legal</td>
<td>High</td>
<td>In Progress</td>
<td>RDM Team/Donna</td>
<td>75%</td>
<td>Terms of use were reviewed by RDM team and Donna. An HTML version was prepared to be added to Dataverse and LibGuides. The terms of use are adapted from the Scholars Portal version. Donna has forwarded them to legal.</td>
</tr>
<tr>
<td>Install production version of Dataverse v. 4.7</td>
<td>High</td>
<td>Complete</td>
<td>Jason (with input from Erin)</td>
<td>100%</td>
<td>Production version was installed once it was released on June 23, 2017 by IQSS/Harvard.</td>
</tr>
<tr>
<td>TwoRavens Installed and working</td>
<td>High</td>
<td>In Progress</td>
<td></td>
<td>75%</td>
<td>Installed but there are still some bugs.</td>
</tr>
<tr>
<td>Datacite Information added to Dataverse</td>
<td>High</td>
<td>In Progress</td>
<td>Jason</td>
<td>50%</td>
<td>Test information in there, once Dataverse is seen by RDM team, Jason will put the &quot;live&quot; datacite Information in there so real DOIs can be minted.</td>
</tr>
<tr>
<td>Terms of use added to Dataverse</td>
<td>High</td>
<td>In Progress</td>
<td>Jason</td>
<td>100%</td>
<td>These are marked in HTML ready to be added. They are uploaded in v.4.7.</td>
</tr>
<tr>
<td>Authentication</td>
<td>Normal</td>
<td>In Progress</td>
<td>Jason</td>
<td>50%</td>
<td>Jason - can you add the OAuth login similar to Harvard? Not sure that we can login with institutional. If not, is this something that can be added later? <a href="https://dataverse.harvard.edu/loginpage.html?sessionid=4f780a9cf056730888af0589f419adb?redirectPage=%2Fdataverse.xhtml">https://dataverse.harvard.edu/loginpage.html?sessionid=4f780a9cf056730888af0589f419adb?redirectPage=%2Fdataverse.xhtml</a> The username/email should be the main option.</td>
</tr>
<tr>
<td>Demo version of Dataverse available for users to demo</td>
<td>Normal</td>
<td>In Progress</td>
<td>Jason</td>
<td>0%</td>
<td>(all of this can be changed at any time)</td>
</tr>
<tr>
<td>Customize v.4.7 (General information - see below)</td>
<td>High</td>
<td>In Progress</td>
<td>Erin</td>
<td>50%</td>
<td></td>
</tr>
</tbody>
</table>
https://dataverse.library.dal.ca/

Share, publish and get credit for your data. Find and cite research data from across all research fields.

Dataverse Category
- Researcher (2)
- Research Project (1)

Publication Date
- 2017 (5)
- 2018 (1)

Author Name
- Smit, Michael (2)
- Kampen, Andrea (1)

1 to 6 of 6 Results

Replication Data for: Digital Tools and Techniques in Scholarship and Pedagogy in the Social Sciences and Humanities
Jan 3, 2018 - Mike Smit dataverse

Kampen, Andrea; Pearson, Maggie; Smit, Michael. 2018, "Replication Data for: Digital Tools and Techniques in Scholarship and Pedagogy in the Social Sciences and Humanities", doi:10.23685/1H9T0V, Dalhousie University Dataverse, V1, UNF:6.ks6ykBAyOw18T1Y0D84Xlw==

Note: this dataset is replication data for the paper: Kampen, A.; Pearson, M., & Smit, M. (2016). Digital Tools and Techniques in Scholarship and Pedagogy in the Social Sciences and Humanities. Technical Report, Dalhousie University. This data is about the adoption, diffusion and...
Dataverse Workflow: From researcher request to data sharing and access

1. **Researcher submits data management request**
2. **Ticket created**
   - Automatically generated
   - Manually generated
3. **Ticket is assigned to RDM team member**
4. **Interview researcher**
5. **Recommend Dataverse?**
   - Yes
     - RDM staff creates a Dataverse for researcher
     - Yes
     - Recommend Dataverse?
     - Yes
     - RDM staff grants researcher permissions to contribute dataset to existing Dataverse.
   - No
   - Recommend alternate data repository
     - Yes
     - End consultation and close ticket
     - No
     - Provide rationale to researcher
     - End consultation and close ticket
6. **Recommend data deposit?**
   - Yes
     - End consultation and close ticket
   - No
     - Designated research team member applies appropriate Terms & Conditions.
8. **DOI automatically minted in Dataverse**
9. **Designated team member reviews files for quality assurance**
10. **Designated Team Member publishes data.**
11. **RDM staff trains researcher in using Dataverse**
12. **Researcher trains team in Dataverse and assigns roles and permissions to Team Members**
13. **Designated research team member customizes Dataverse appearance / fields.**

---

Draft version 2.0
20-Jan-2017
DAL LIBRARIES’ RDM TOOLKIT

- Training materials
  - Dataverse powerpoint & handout for training
  - DMP Assistant video
  - Libguide
    - Links to all tools and repositories
  - Video Tutorial (DMP Assistant video tutorial, etc)
  - Finding other repositories (subject repositories)
  - Training materials (Portage & others):
    - RDM Dataguide
    - RDM for busy people

http://dal.ca.libguides.com/rdm
WHERE TO NEXT?

- Building & Expanding our Team (Liaison Librarians, Committee Terms of Reference, Roles, etc)
- Dataverse & RDM Promotion
- More Policies: Clear Collections Policy and Storage Policy (ie. storage space per individual, etc).
- Preservation Piece…
- Dataverse North?
INTERESTED IN LEARNING MORE?

Email us! (Sarah and/or Erin)
Or see us at APLA!