Sharing & Collaborating on ESS-DIVE Datasets

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Objectives

- Why share your datasets on ESS-DIVE
- What sharing permissions options are available
- How to use this new feature to share datasets
- Review other capabilities:
  - Sharing with the Package Service API
  - Sharing Data Portals

You can now assign permissions that enable your team members to review, edit, revise, or publish datasets that you have created!
*NEW* Data Sharing

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Lorghi Cordeiro A; Valverde-Barranzas O; Obitas E; Gonçalves N; Andersen K; Quesada C; Norby R (2021): Fine-root production, mortality, and standing stock from minihabitat measurements, AmazonFACE site, Brazil. Next-Generation Ecosystem Experiments (NGEE) Tropics, ESS-DIVE repository. Dataset, eess-dive-3b51f0631d3416f6-20211202T0545430502058929 accessed via https://data.ess-dive.lbl.gov/datasets/eess-dive-3b51f0631d3416f6-20211202T0545430502058929 on 2022-01-06.

To submit a new data package or make minor revisions to an existing data package:
1. Add File
2. Enter the required fields in the sections below
3. Hit the submit button which appears after the first metadata entry

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Overview

By submitting your dataset, you agree to the ESS-DIVE terms of use.

Submit Dataset
What does it mean to share datasets?

Sharing a dataset with others on ESS-DIVE can allow them to:

- view private datasets,
- edit metadata,
- add/remove files,
- publish the dataset, and
- share the dataset with others
Why share data?
There are many reasons you may consider sharing your datasets on ESS-DIVE!

Your team members need to review private datasets before publication.
A team member started a dataset but **someone else needs to complete it**

There are many reasons you may consider sharing your datasets on ESS-DIVE!
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A PI or data manager needs to view or own all **public and private** datasets created by that project.
There are many reasons you may consider sharing your datasets on ESS-DIVE!

A developer programmatically uploaded a dataset using the Package Service API and a data manager needs access to manage or edit it.
Permission Types
Only certain people can receive permissions

**General Public**
Anyone can go to ESS-DIVE to view and download data
*But they cannot receive dataset permissions*

**ESS-DIVE Account**
Must use an ORCID to login to ESS-DIVE and create an account
*With an account, you can receive permission*

**Data Contributor**
After logging in, must send a formal request to ESS-DIVE to create datasets
*As a Contributor, you can receive permissions*
The Permission Type determines what you can do to a dataset

View
Must have an ESS-DIVE Account
Can read and search for private datasets

Edit
Must be a Data Contributor
Can read, edit metadata, add/remove files, and publish datasets

Manage
Must be a Data Contributor
Can do everything an editor can and can add/remove people from dataset permissions
What about the person who created the dataset?

Creator

The Creator has Manage permission by default

Must be registered as a Data Contributor

The creator’s permissions **cannot be altered or removed**. They will always have access to the dataset.
Any Questions?
How to Share a Dataset
Step 1: On the dataset landing page, select the Edit button.
Step 2:

In edit mode, you will see the Share button next to the Add/Remove buttons. Select the Share button. Only people who receive “Manage” permission can share datasets.
Step 3:

A new window will appear titled “Sharing Options”.

You will see a table that shows you who the dataset is already shared with and what permission type they have.

Only people who receive “Manage” permission can share datasets.
Only people who receive “Manage” permission can share datasets

Step 4:
Search for the first or last names in the search bar. Select the name to add it.

They must have an ESS-DIVE Account to receive permission
Step 5:

Modify existing permission types using the dropdown bars under the Access column

Only people who receive “Manage” permission can share datasets
Step 6:
Review your changes and hit Save

Step 7:
When you have finished sharing your dataset, Submit your changes to ESS-DIVE
*DEMO* Live demo for sharing a dataset
WARNING: Concurrent Editing is Not Possible

If you and another colleague are editing a dataset at the same time, the last person to hit submit will overwrite all previous edits.
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- To avoid overwriting metadata progress, we encourage using ESS-DIVE’s Offline Metadata Template
- Download the Google doc and share with colleagues using your preferred collaborative text editor
Sharing Data Portals
Sharing Portals

It is also possible to share portals using this new feature!
Start editing your portal and go to the settings page to add collaborators

- Your team members can edit page markdown, add/remove pages, and add/remove data filters

- Sharing portals does not share access to the datasets in the portal. There is no way to share more than one dataset at a time.
Sharing Data with the Package Service API
Quick Overview of Sharing Datasets with the API

ESS-DIVE’s Package Service API allows you to programmatically create and edit datasets. The API has now been extended to allow you to programmatically share datasets.

Dataset sharing with ESS-DIVE’s API follows standard HTTP request schema. This webinar does not go into the details of how to setup an HTTP request.

Please visit the Package Service Tutorial documentation page to learn more about this service.
Quick Overview of Sharing Datasets with the API

What you need:

- Team Member's ORCID
- Dataset Identifier
- Your Authentication Token

Grab the code!

https://api.ess-dive.lbl.gov/

Copy the code from the website linked above and enter your authentication token, dataset identifier, and team member orcid where instructed.
Find Datasets Shared with You
Find Shared Datasets using the “My Data Packages” Filter

In your profile drop down, there is an option to select “My Data Packages”

This will automatically filter the data search page by datasets that you:

- Created yourself,
- Have permission to edit,
- Have permission to manage
For editors and managers:

Go to “My Data Packages” to filter just the datasets you work on.

Then, use the search filters to locate the shared dataset you are looking for.

There is no way to filter only for the datasets you can view, edit, or manage. All are displayed at once.
If you have view permission:

These datasets cannot be found with your "My Data Packages" filter.

You can find these datasets by using the usual search filters on the data search page.

We recommend searching by project title and/or the dataset creator name.
Sharing Help
You can find all this material on ESS-DIVE’s…

Sharing Data Documentation page
https://docs.ess-dive.lbl.gov/

Webinar page
where this slide deck is available for download
https://ess-dive.lbl.gov/
Teams can now manage datasets collaboratively!

- Grant your team members permission to view, edit, or manage your dataset
- Add or remove permissions **at any time**
- While you can edit a dataset collaboratively, **editing is not concurrent** and progress can be overwritten accidentally
- Consider using ESS-DIVE’s Package Service API to **programmatically share your datasets**
- You can use this feature to **share Data Portals** from your portal’s settings page
Thank You!

@ESS-DIVE

Join ESS-DIVE’s Community Mailing List!

Contact us at ess-dive-support@lbl.gov