Sharing & Collaborating on ESS-DIVE Datasets

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Computer Systems Engineer
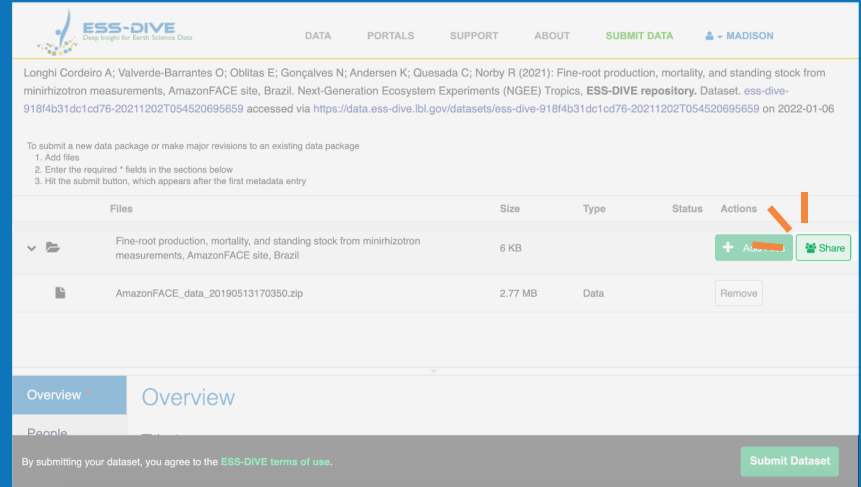
Objectives

- 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!

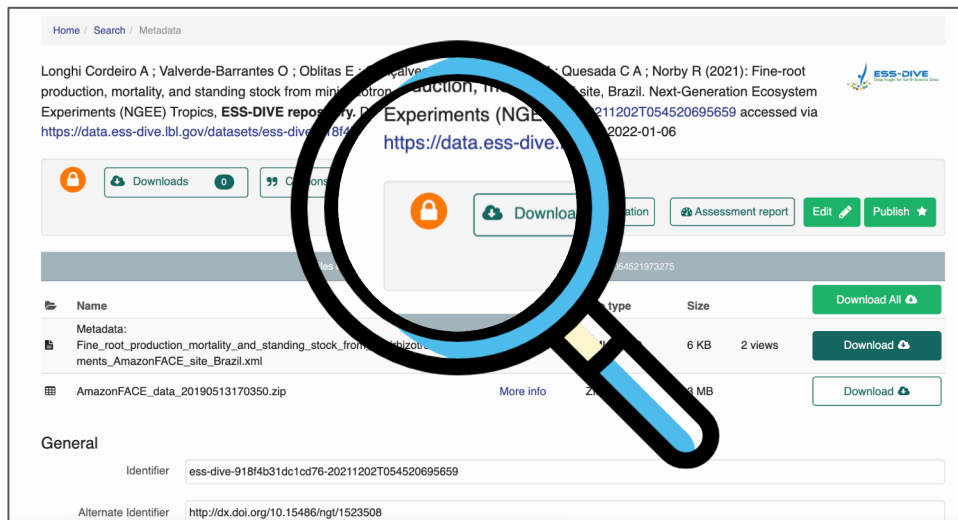# *NEW* Data Sharing

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

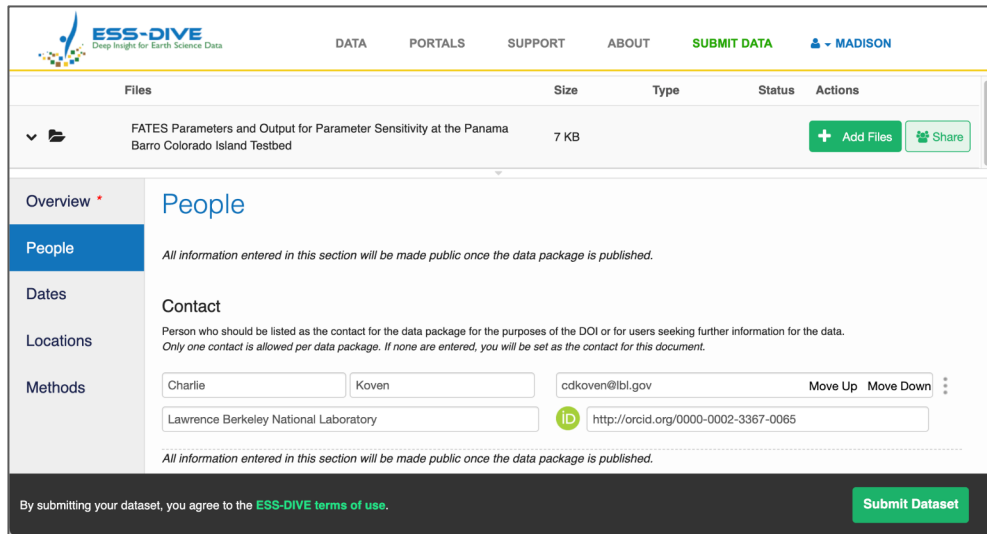- **share** the dataset with others

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

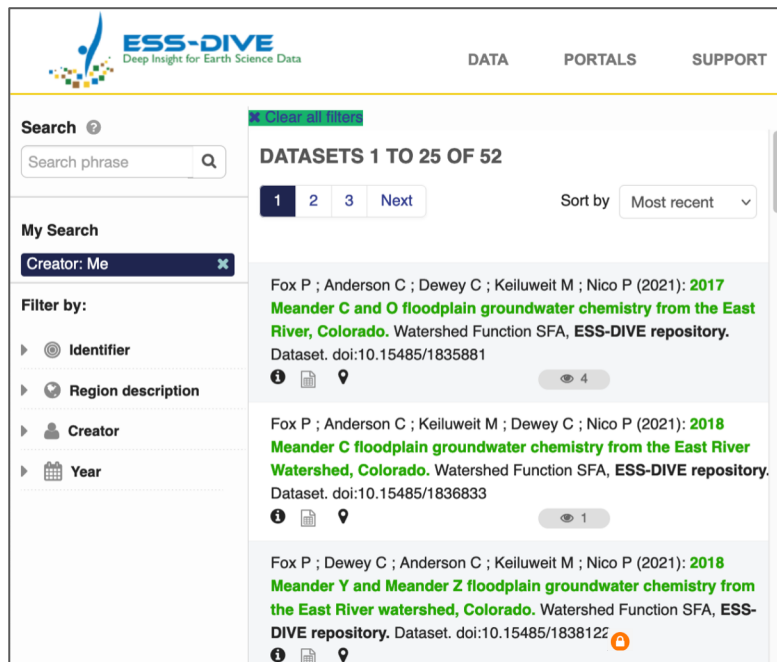# There are many reasons you may consider sharing your datasets on ESS-DIVE!

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!

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!

Metadata Only

Submit the JSON-LD object to the package service

```
1  post_packages_url = "{}{}".format(base,endpoint)
2  post_package_response = requests.post(post_packages_url,
3                                        headers={"Authorization":header_authori
4                                        json=json_ld)
5
6  if post_package_response.status_code == 201:
7      # Success
8      response=post_package_response.json()
9      print(f"View URL:{response['viewUrl']}")
10     print(f"Name:{response['dataset']['name']}")
11 else:
12     # There was an error
13     print(post_package_response.text)
```

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

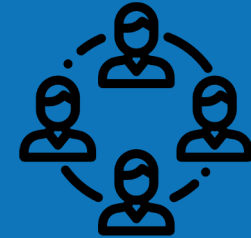The Creator has **Manage permission** by default

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?

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How to Share a Dataset

Step 1:

On the dataset landing page, select the Edit button

Only people who receive "Manage" permission can share datasets

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

Sharing options

Permissions

Give registered ESS-DIVE users permissions to view, edit, or manage the metadata record **and** data files for this dataset publication.

- **View** - your team member can see this dataset when it's private. This dataset will appear on the search page when they login to ESS-DIVE.
- **Edit** - your registered* team member can see this dataset when it's private, change the dataset metadata, add/remove files, publish the dataset, and edit the dataset after its published. This dataset will appear in their "My Data Packages" list.
- **Manage** - your registered* team member has all the same access abilities as an editor and in addition can share this dataset with other people or remove people from the dataset permissions. This dataset will appear in their "My Data Packages" list.

*this person completed the New Data Contributor form and was approved to edit and submit metadata to ESS-DIVE

Name	ORCID	Access ⓘ
👤 Madison Burrus (You)	ⓘ http://orcid.org/0000-0002-0439-9173	Manage

Search by name, ORCID, or group name

Hesham E

Hesham Elbashandy (http://orcid.org/0000-0002-7535-8045)

View ▼ ➕

*

Cancel   Save

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

ESS-DIVE

Only people who receive "Manage" permission can share datasets

Step 5:

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

Only people who receive "Manage" permission can share datasets

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Name	ORCID	Access ⓘ
👤 Madison Burrus (You)	ⓘ http://orcid.org/0000-0002-0439-9173	Manage
👤 Hesham Elbashandy	ⓘ http://orcid.org/0000-0002-7535-8045	View

Search by name, ORCID, or group name

e.g. Lauren Walker   View

Cance   **Save**

Submit Dataset

## 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**.

WARNING: Concurrent Editing is Not Possible
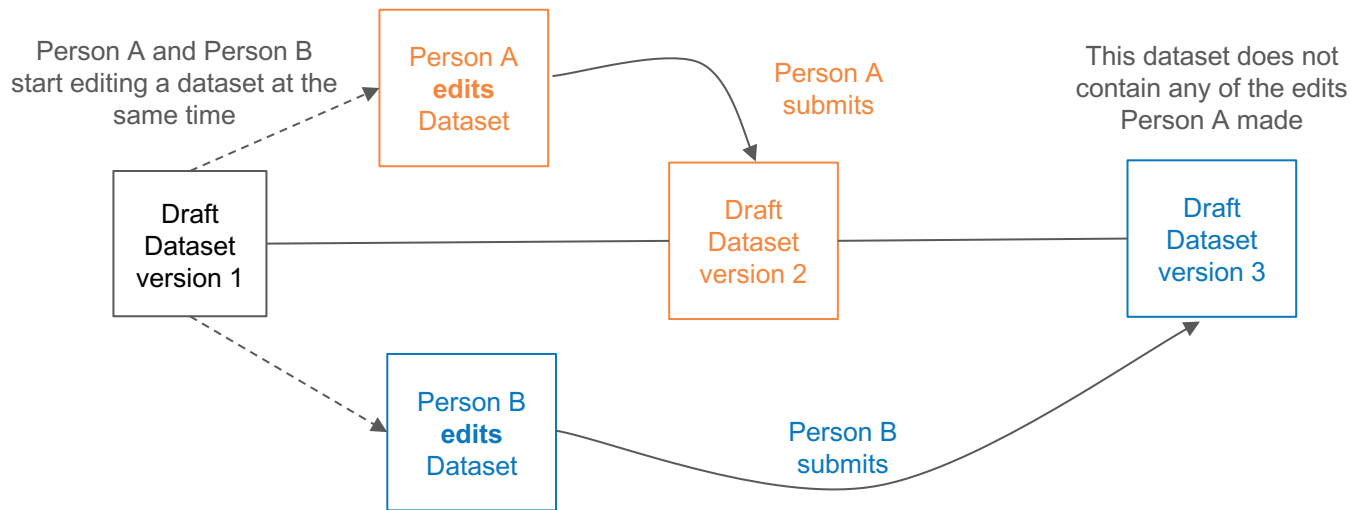
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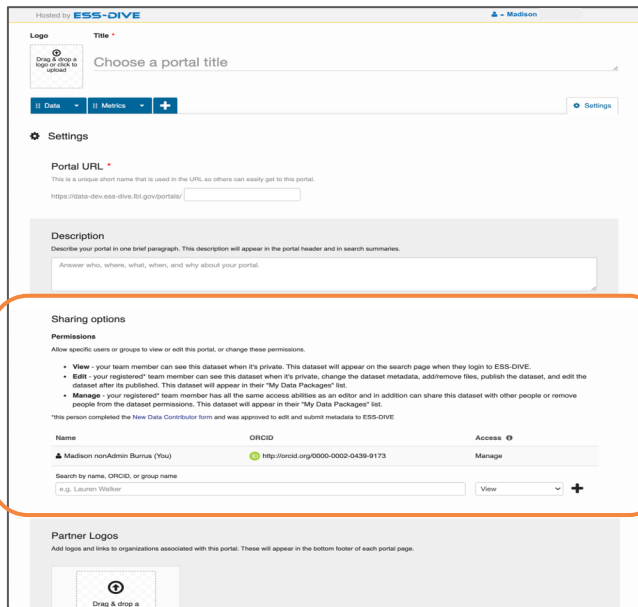

- To avoid overwriting metadata progress, we encourage using ESS-DIVE's Offline Metadata Template

- 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.
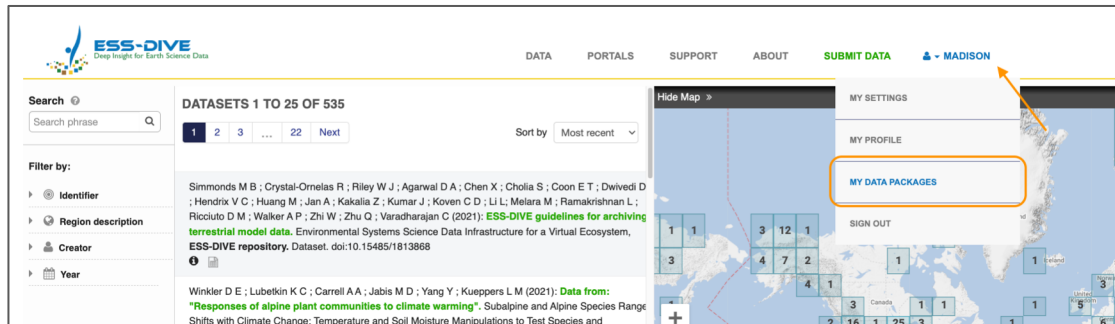
Find Datasets Shared with You

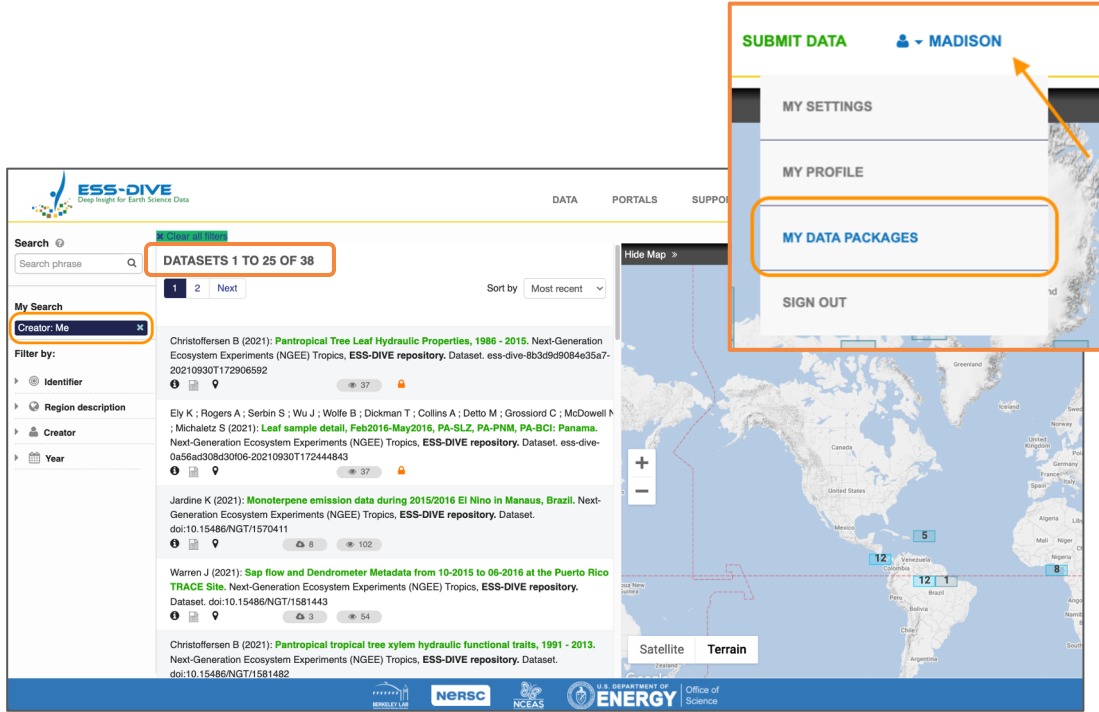# Find Shared Datasets using the "My Data Packages" Filter

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:
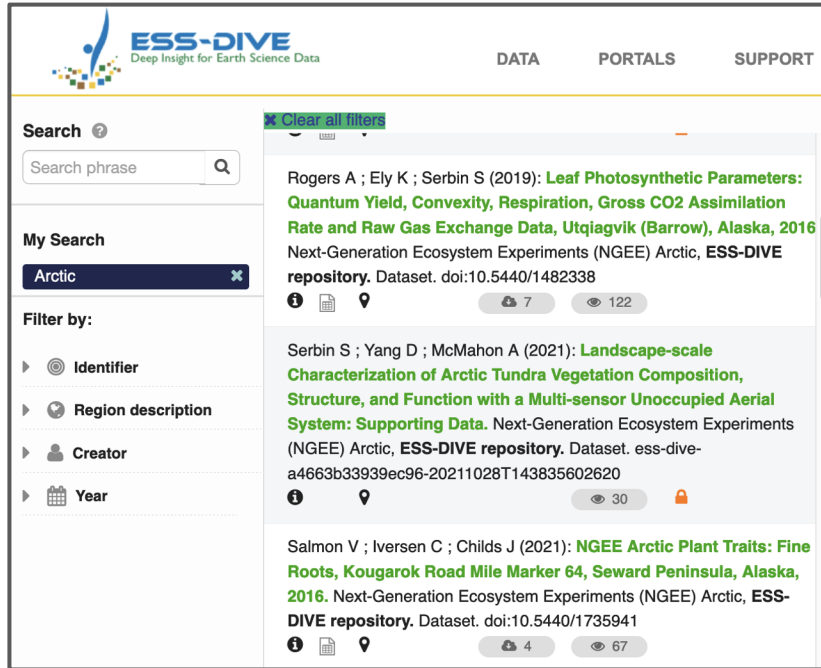
Go to "**My Data Packages**" to filter just the datasets you work on

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
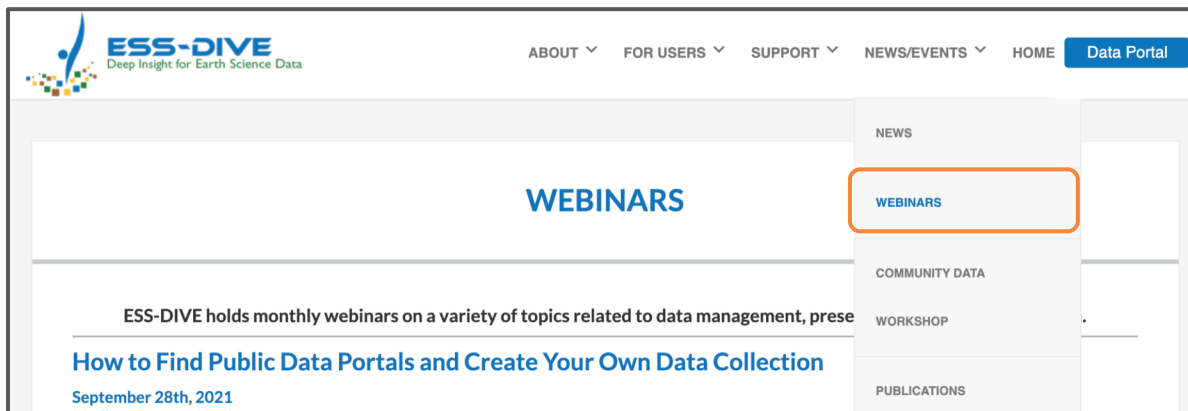
Sharing Help

You can find all this material on ESS-DIVE's…
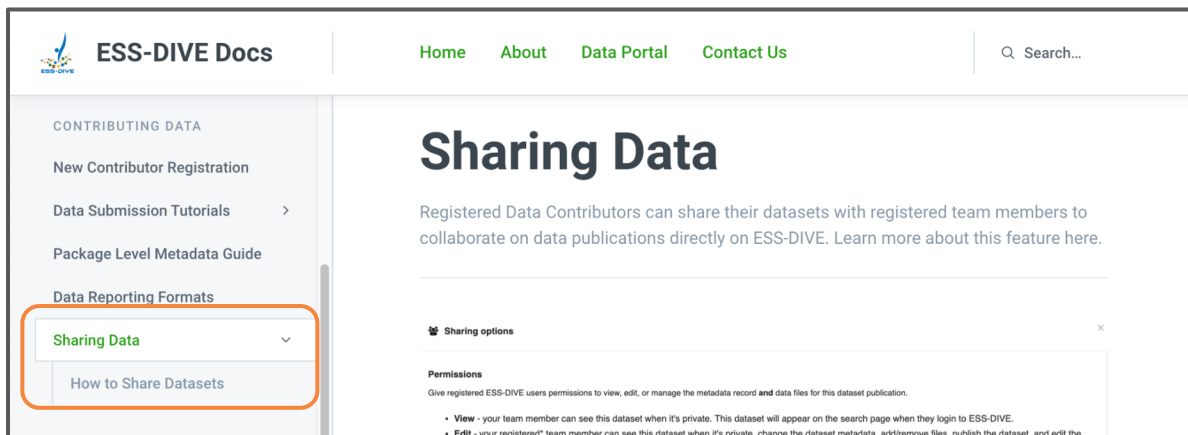
Sharing Data Documentation page
https://docs.ess-dive.lbl.gov/

Webinar page
where this slide deck is available for download
https://ess-dive.lbl.gov/

Summary

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!
http://bit.ly/essdiveMailingList

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

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