Project Data Management on ESS-DIVE

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Objectives

- **Introduce** new project data management features

- Learn **how to set up** project data management features
  - Plus a **live demo** of creating teams and sharing datasets

- **Feedback Session:** tell us what your project needs!

  *This session is designed for **data managers and ESS Project PIs***

What is your primary role in your research group?

Field Scientist/Data Collector

Lab Scientist/Data Analyzer

Data Manager

Data User

PI

How are you hoping to manage your project's data on ESS-DIVE?

Top

NEW Project Data Management Features

Overview of Data Management Features

Dataset Sharing

Collaborate on a single dataset

Data Portals

Create a collection of datasets

External Linking

Link to other repos and data systems

NEW **Suite of Project features**

Enables dataset sharing across a project
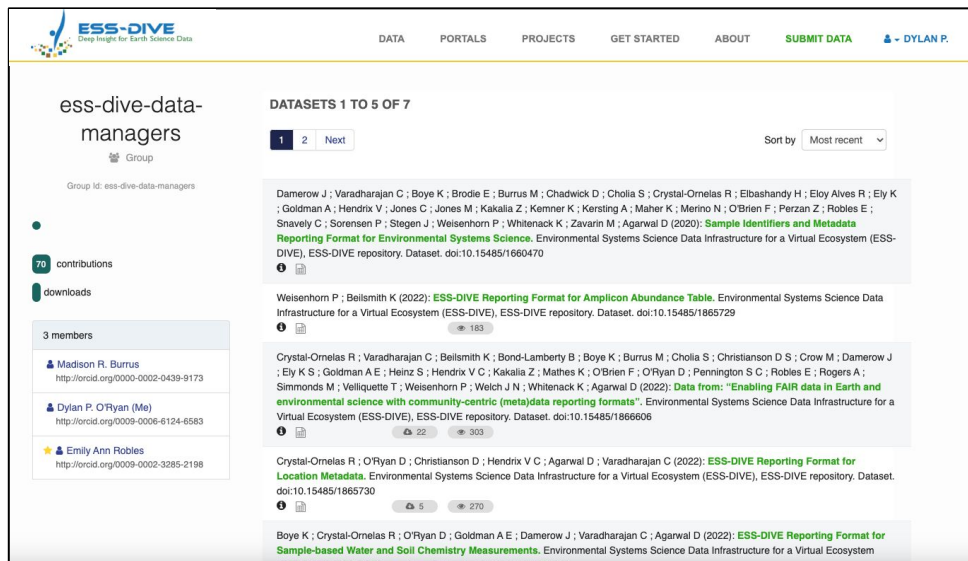
Motivation: why use the new project features?

The project data management features make it easy to
share access to datasets across a project

Project's can now create **teams** and then **share datasets** with teams

Sharing a dataset with a team grants **all team members access** that dataset

As more datasets are shared with a team, this creates a central location to manage access project datasets across groups of people

Example of a team profile

Manage team members

Only **PIs** and **data managers** can create teams and manage who is in a group

- PIs must approve who can be data managers for their project

- PIs/data managers can add or remove team members at any time

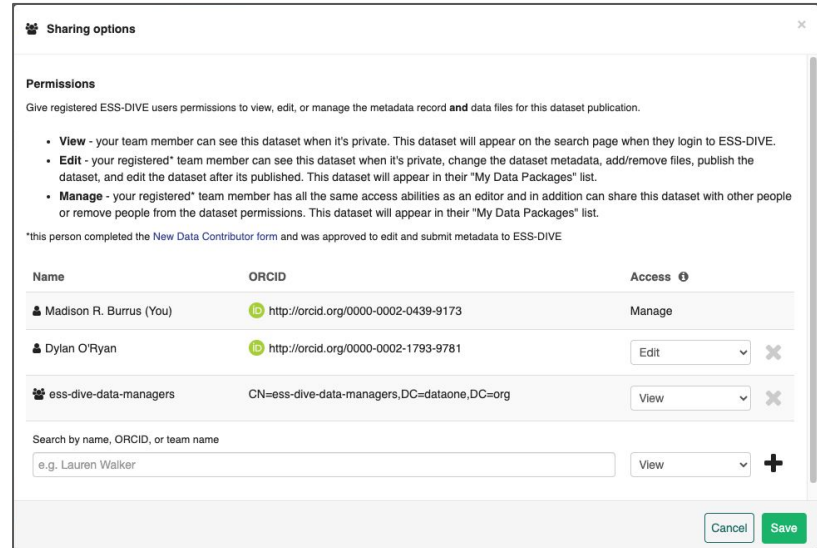- Change who can access all datasets in a team profile simply by changing the team members

Example of adding someone to a team

Manage team access to datasets

With PIs managing team members, data contributors can simply share their datasets with a team

- Share datasets with a team by looking up the team name

- You can add or remove teams/people from the sharing options at any time

The idea is to share datasets with teams as a default and then manage those team members over time as project members change

Example of a dataset shared with one team and one individual

Overview of **NEW** Project Management Features

When used in tandem, the following 5 new project management features support sharing across a project. **Each project must first setup these features** before they can start using them:

1. **ESS-DIVE's Project List**: Controlled list of projects approved to store data

2. **Project Data Manager Role**: Someone approved by their PI to create teams

3. **My Projects page**: A place to access teams and other project information

4. **Teams**: A group of ESS-DIVE users that is managed by project data managers

5. **Share with teams**: Any data contributor can share their datasets with teams

PIs must initiate the process to setup your project
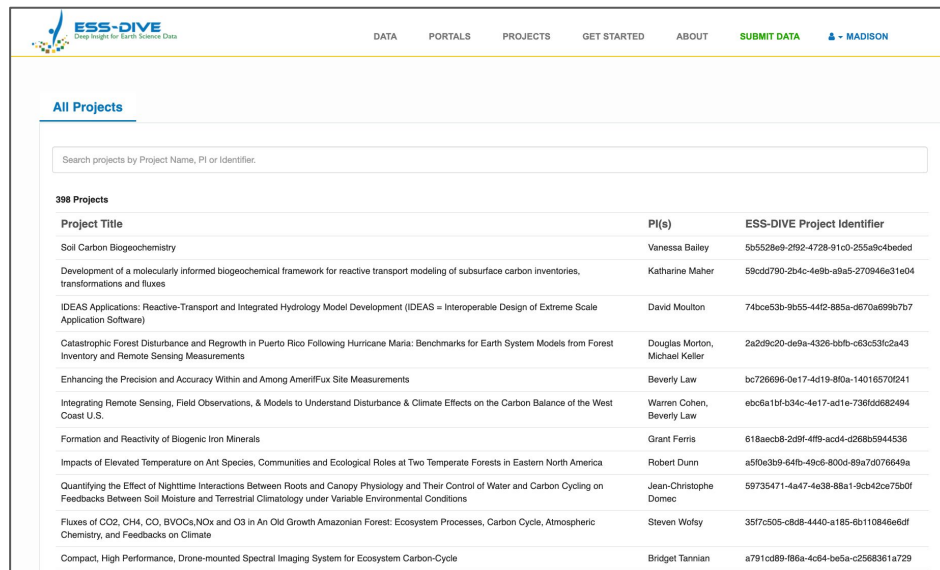
ESS-DIVE's Project List

A searchable list of projects **approved to publish data** on ESS-DIVE

- This list does away with inconsistent project titles and provides a controlled list of **unique project identifiers**

- Ensures your **dataset citations are consistent** within ESS-DIVE

As a first step, make sure your project information is present and correct

PIs will need to email ESS-DIVE to update project information or add a project.
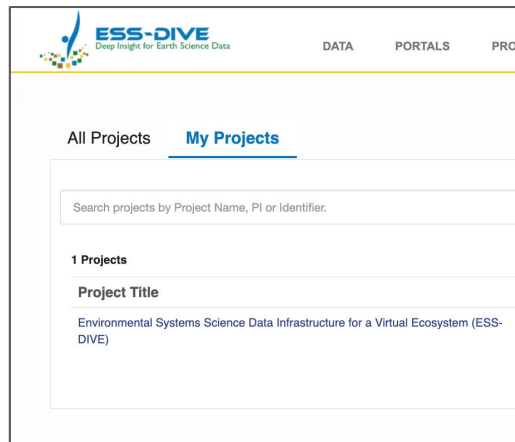

https://data.ess-dive.lbl.gov/projects

Project Data Managers

A project data manager **is a role** in ESS-DIVE that **enables you to access** your projects and teams.
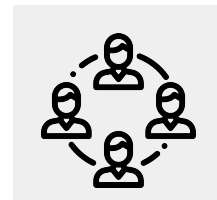

Become a project data manager

⭐Requires PI approval

Gain access to your project page

Create teams for your project

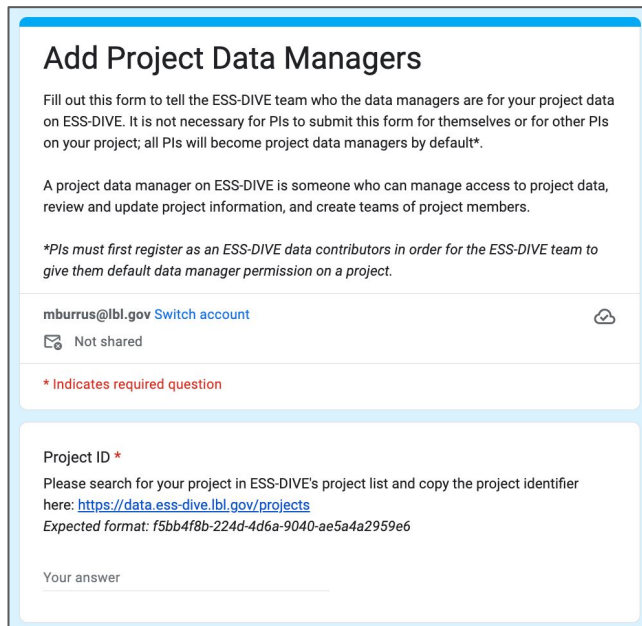# How to Become a Project Data Manager

PIs and Co-PIs:

Automatically project data managers

- First [register as a data contributor](#)

- If you can't access your project(s) once you are registered, contact ESS-DIVE

All other project members:

PI permission required

- [Register as a data contributor](#)

- Ask your PI to fill out the [Add Project Manager form](#) to grant you approval

If you are on multiple projects, each project PI will need to approve you individually

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Add Project Data Managers

Fill out this form to tell the ESS-DIVE team who the data managers are for your project data on ESS-DIVE. It is not necessary for PIs to submit this form for themselves or for other PIs on your project; all PIs will become project data managers by default*.

A project data manager on ESS-DIVE is someone who can manage access to project data, review and update project information, and create teams of project members.

*PIs must first register as an ESS-DIVE data contributors in order for the ESS-DIVE team to give them default data manager permission on a project.

mburrus@lbl.gov Switch account

Not shared

* Indicates required question

Project ID *
Please search for your project in ESS-DIVE's project list and copy the project identifier here: https://data.ess-dive.lbl.gov/projects
Expected format: f5bb4f8b-224d-4d6a-9040-ae5a4a2959e6

Your answer

Once you become a project manager…

https://data.ess-dive.lbl.gov/projects

Once you become a project manager…

The "My Projects" tab will appear on the projects page.
This tab is only visible to project managers.

View your project pages

My Projects page

Quickly check if which projects you are assigned project data manager to

Project Information page

Quickly check who else has project data manager access to your project

View your project pages

Project Information page

My Teams

The My Teams page lists **teams you are a member of** within a project

- **View** teams you are a member of

- **Create** teams for your project

- **Manage** team members

Projects can have multiple teams

Project managers won't see a project team here
unless they are added to that team

My Teams

The My Teams page lists **teams you are a member of** within a project

- **View** teams you are a member of
- **Create** teams for your project
- **Manage** team members

Projects can have multiple teams

Consider **adding project data managers to every team** within a project

ess-dive-data-managers (3 members)

👤 Madison R. Burrus (Me)
http://orcid.org/0000-0002-0439-9173

👤 Dylan P. O'Ryan
http://orcid.org/0009-0006-6124-6583

⭐ 👤 Emily Ann Robles
http://orcid.org/0009-0002-3285-2198

Example of a team

PROJECT DATA MANAGER(S)
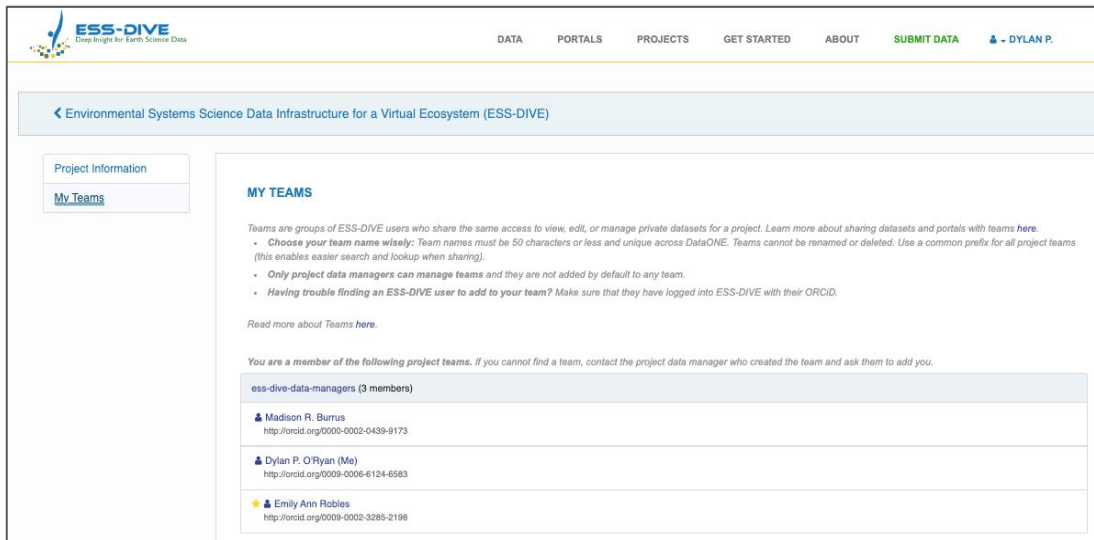
Project data managers can create and manage teams on the My Teams page. Teams can be contributors are project data managers by default. Contact ESS-DIVE (ess-dive-support@lbl

Emily Robles - http://orcid.org/0000-0003-3720-6566

Charuleka Varadharajan - http://orcid.org/0000-0002-4142-3224

Dylan O'Ryan - http://orcid.org/0000-0002-1793-9781

Deb Agarwal - http://orcid.org/0000-0001-5045-2396

Valerie Hendrix - http://orcid.org/0000-0001-9061-8952

Joan Ball-Damerow - http://orcid.org/0000-0003-2601-5043

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

Shreyas Cholia - http://orcid.org/0000-0002-4775-8201

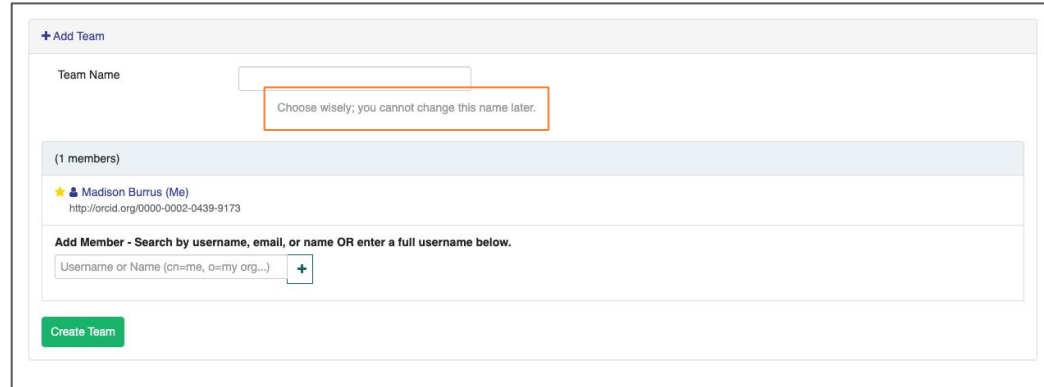*Project data managers are not a team and do not behave like a team*

Teams

Teams are groups of ESS-DIVE users

- i.e. someone who has logged into ESS-DIVE with their ORCID

While you can manage team members at any time, **teams cannot be renamed or deleted**

When creating a team it's important to first consider **who you want to be on the team and what the team is for**

This is why ESS-DIVE recommends using our test service, **Sandbox**, to play around with teams first
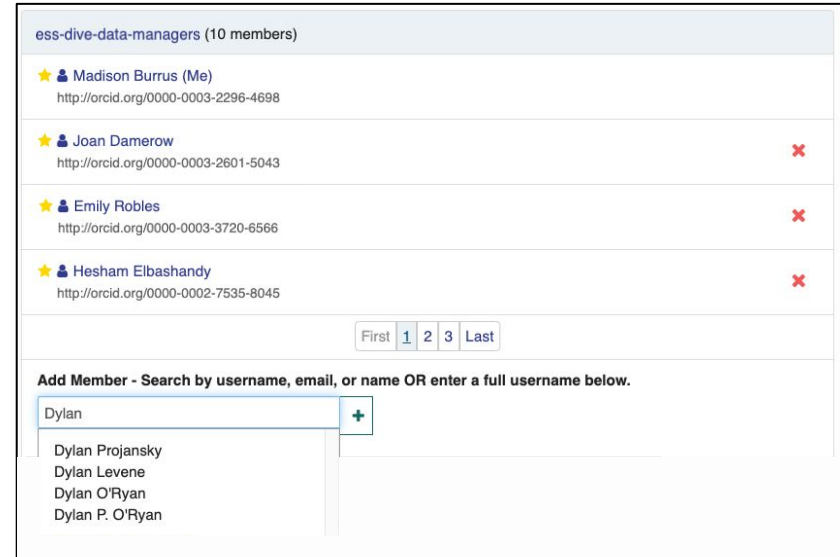

Project data managers can add anyone who has logged into ESS-DIVE to a team

Creating teams

When creating a team it's important to first consider **who you want to be on the team and what the team is for**

What can teams be used for?

- **Data managers** who need to **manage** project dataset permissions and publication

- **Collaborators** who need to **edit** the same datasets together
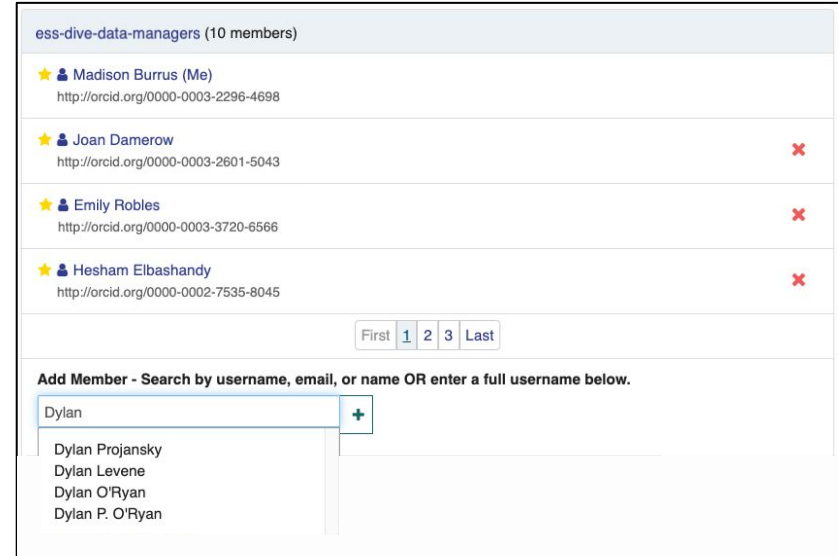
- **Reviewers** who need to **view** private datasets

Teams cannot be deleted or renamed

Team Names

When creating a team it's important to first consider **who you want to be on the team and what the team is for**

ESS-DIVE's recommendations for naming teams:

- Use common **prefix** for all teams in your project

- Use the intended purpose or access level* as **suffix**
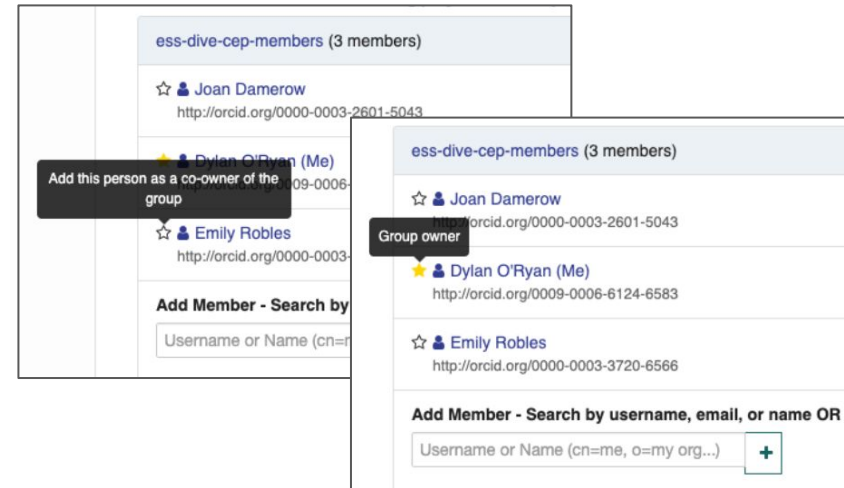
- Have a team just for project data managers

Teams cannot be deleted or renamed

Teams Owners

A team co-owner can **add and remove team members** over time

- The project manager who created the team is **the only team owner at first**

- **Add one co-owners** after creating a team by **starring** their name

Sharing datasets with teams

Datasets are not shared with any project teams by default

Projects will need to **manually share** all project datasets with teams

PIs and project data managers should work with your data contributors

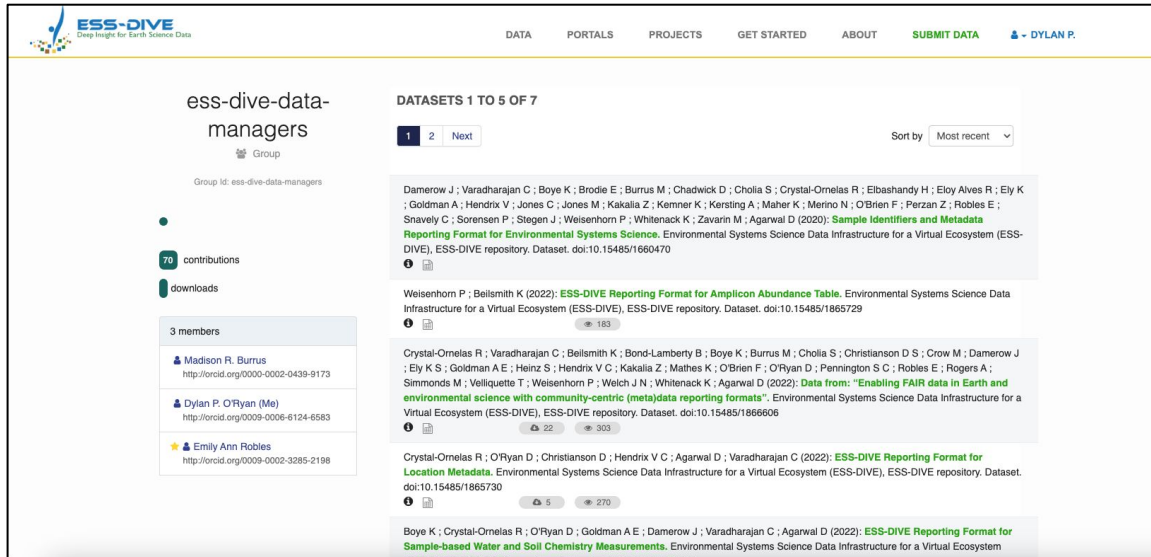Team permissions are simple and don't assume how projects want to share their data
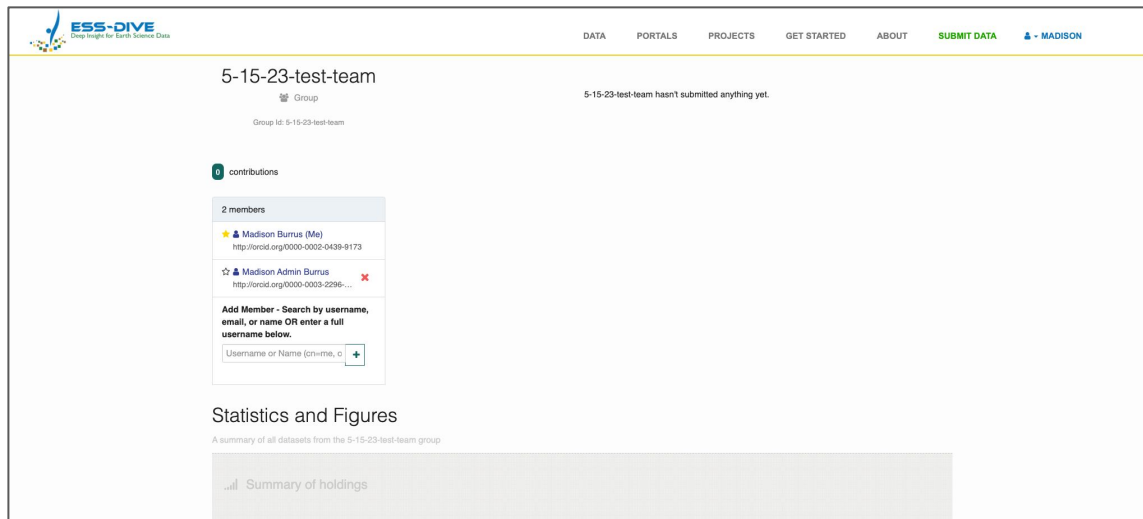
Example of a test team on Sandbox

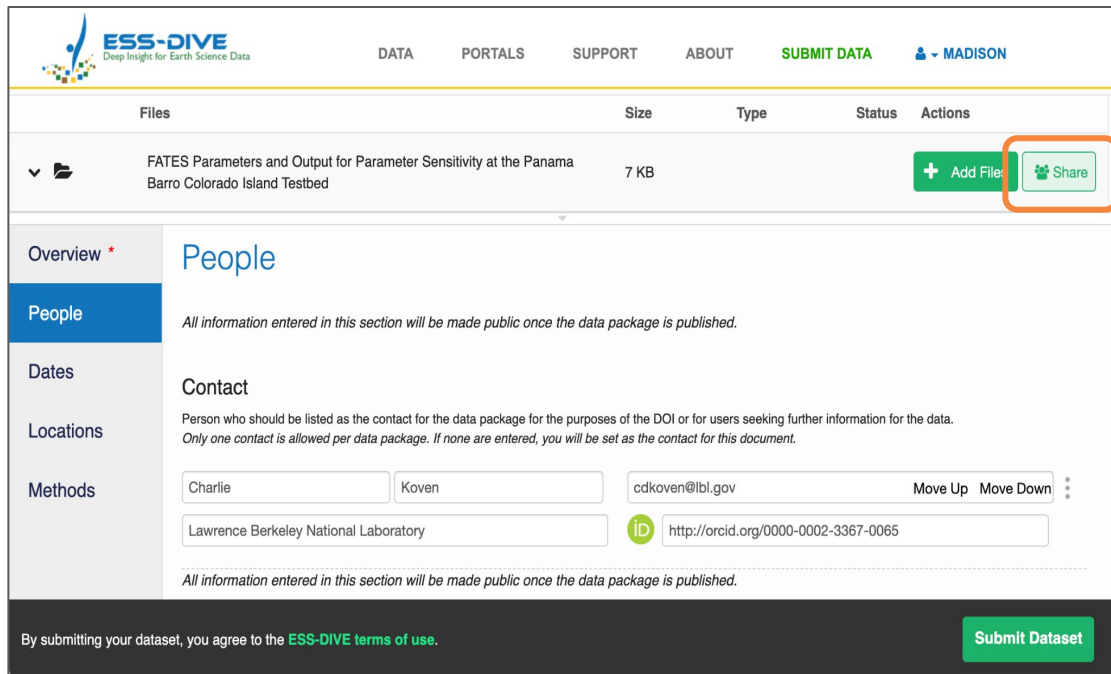# Sharing datasets with teams

Data contributors should start sharing with data managers **at the time they submit a new dataset**

Data managers will then be able to **access shared datasets** from the team profile **right away**

Consider sharing manage access with data managers to allow data managers to independently update data permissions in the future

Sharing datasets with teams

Data contributors can choose who should **view, edit, and manage their datasets**

Permission Types

Viewer	Editor	Manager
● **view** private datasets	● **view** private datasets	● **view** private datasets
	● **edit** metadata	● **edit** metadata
	● **add/remove** files	● **add/remove** files
	● **publish** datasets	● **publish** datasets
		● **share** datasets with others

Why share datasets with teams?

- **Collaborate** with team members and co-authors

- Provide PIs and data managers **access to project datasets**

  - Manually share project datasets to view all public <u>and private datasets</u> together

Benefits of sharing with teams:

- Easy to share with a **consistent group**, **instead of** one person at a time

- **Update team members** over time, **instead of** individual dataset permissions

  - As people enter or leave a project, manage the team members who can access project datasets

Recap: Project Setup Workflow

1. Check the **Project List** to ensure your project information is accurate
   a. **PIs:** Contact ESS-DIVE if information in out of date

2. Register as a data contributor
   a. **PIs:** Check that you were automatically assigned as a project manager

3. **PIs:** Fill out Add Project Data Manager form
   a. **Everyone else:** Ask your PI(s) to fill out the Add Project Data Manager form

4. Visit your **project page** and verify project information

5. Create **teams** for your project

6. **Share** your datasets with your project teams

Overview of Roles on ESS-DIVE

ESS-DIVE User

Someone who logged into ESS-DIVE using their ORCID.

Data Contributor

An ESS-DIVE user who was approved by ESS-DIVE to upload data; they can create, edit, and publish datasets.

NEW: Project Data Manager

A data contributor approved by a project PI to create and manage teams for that project.

NEW: Team

A group of ESS-DIVE users who share access permissions to datasets and data portals.

Any Questions?

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How-To Set up Project Management

Practice using ESS-DIVE **Sandbox**

Sandbox is a test system where you can practice using any ESS-DIVE feature.
Data on Sandbox is *NOT* preserved in ESS-DIVE.

https://data-sandbox.ess-dive.lbl.gov

This webinar uses a fake project on Sandbox

Practice creating teams with project titled "ESS-DIVE June 2023 Webinar"

https://data-sandbox.ess-dive.lbl.gov

Practice after webinar

If you would like to try creating teams on the demo project, please login to Sandbox and we'll add you right after the webinar

Create an ORCiD
https://orcid.org/register

Sign in to Sandbox
https://data-sandbox.ess-dive.lbl.gov

Summary of creating teams

1. Select the My Teams page

2. Click the **"+ Add Team"** button at the bottom of the page

3. **Carefully** choose a team name
   Reminder: teams cannot be deleted or renamed later

4. Search for **team members** by name or ORCID to add them

5. Select **"Create Team"**

6. A green pop-up message will appear, click the **View it Now** link to visit the team profile and ensure your team was successfully created

7. **Return** to your My Teams page

8. Add at least one **co-owner**

ESS-DIVE recommends enabling full team visibility and access for project managers:
Add and **star all project managers** on every team you create

Summary of sharing datasets

1. Submit new or open existing dataset
   new datasets cannot be shared until after initial submission

2. Select the "Edit" button then the "Share" button

3. Grant permission to one team and one individual

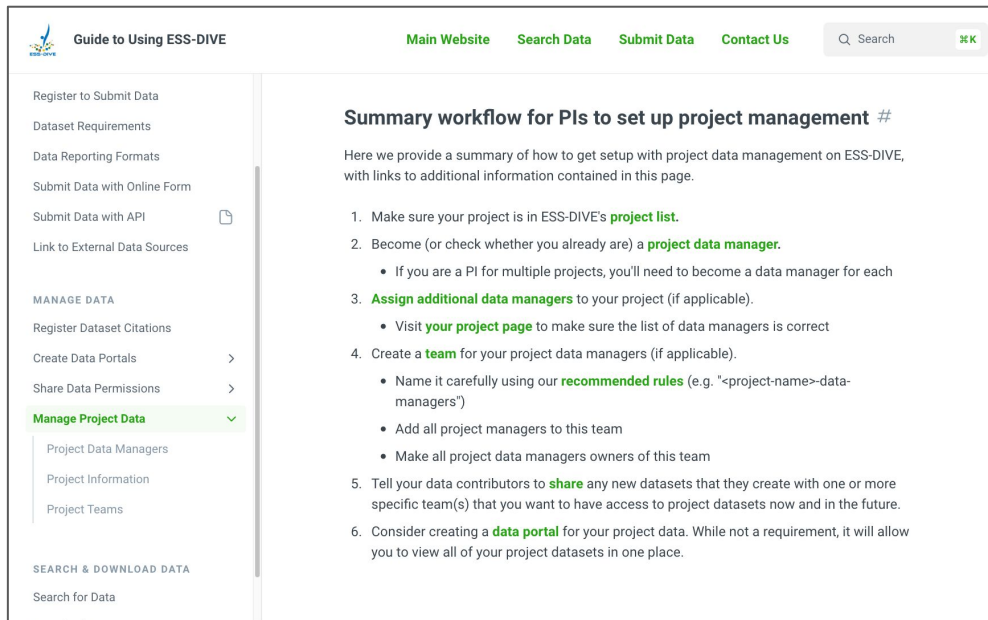4. Click Save

5. Click Submit Dataset

Review the project management set up steps

You can review these steps at any time in our documentation

Manage Project Data

https://docs.ess-dive.lbl.gov/manage-data/manage-project-data

Please keep in mind that we highly recommend trying these features out on **Sandbox** first!

What's Next?

What can we do now that we have teams?

- **Project data managers** can create teams and encourage data contributors to start sharing datasets and portals with teams

- **Data contributors** can share their datasets with their project teams

Eventually, your teams will have access to a list of datasets.
Project managers can update team members over time as people enter or leave a project

Feedback Session: What do you think?

Connect With Our Team!

To get help:

ess-dive.lbl.gov

 ess-dive-support@lbl.gov

docs.ess-dive.lbl.gov

To stay updated:

ess-dive-community@lbl.gov

 @essdive

https://bit.ly/essdiveMailingList