



Project Data Management on ESS-DIVE

Madison Burrus

Computer Systems Engineer



June 2023 Webinar

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

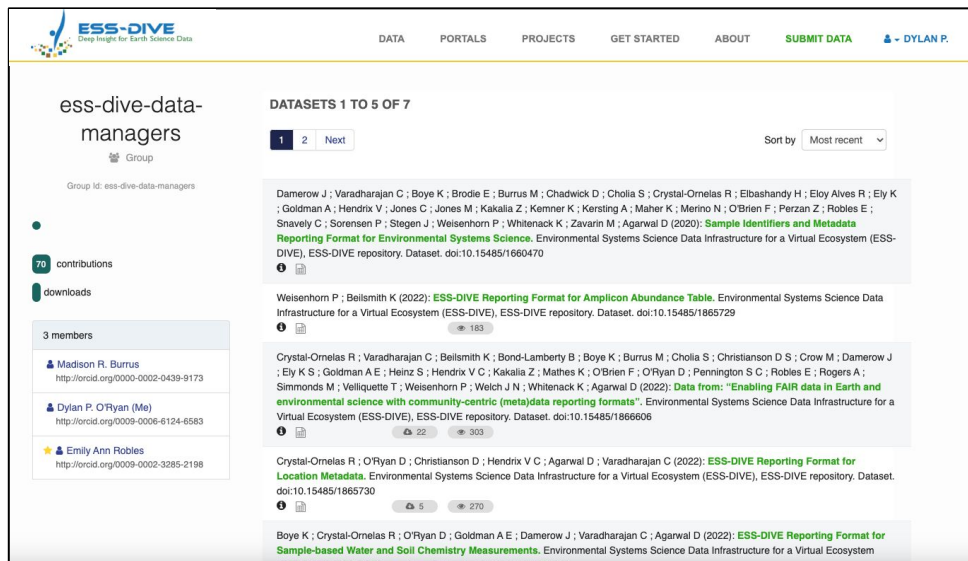
Motivation: why use the new project features?

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



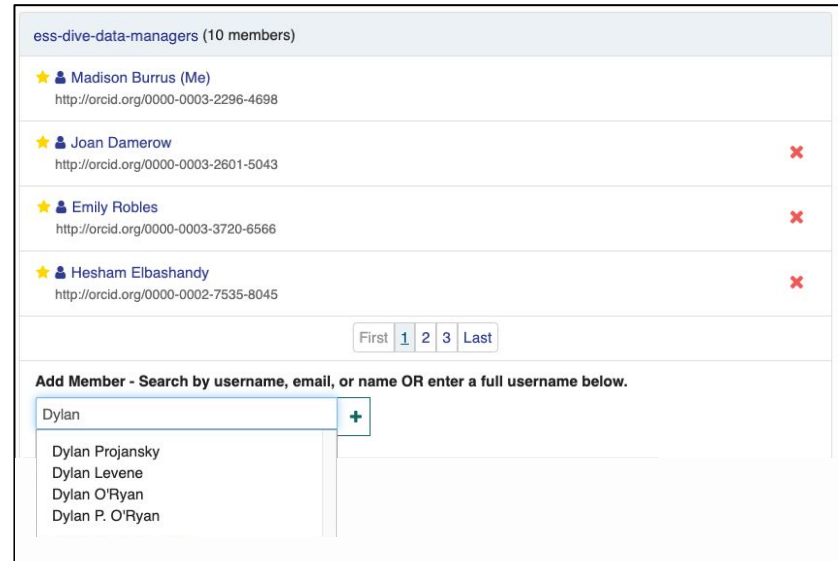
The screenshot shows the ESS-DIVE website interface. At the top, there's a navigation bar with links: DATA, PORTALS, PROJECTS, GET STARTED, ABOUT, and a green 'SUBMIT DATA' button. A user profile 'DYLAN P.' is visible in the top right. The main content area is titled 'ess-dive-data-managers' and shows a group profile. On the left, it lists '79 contributions' and '3 members'. The members listed are Madison R. Burrus, Dylan P. O'Ryan (Me), and Emily Ann Robles. The right side displays a list of datasets under the heading 'DATASETS 1 TO 5 OF 7'. Each dataset entry includes the title, authors, and a brief description. For example, the first dataset is 'Damerow J ; Varadharajan C ; Boye K ; Brodie E ; Burrus M ; Chadwick D ; Cholia S ; Crystal-Ornelas R ; Elbashandy H ; Eloy Alves R ; Ely K ; Goldman A ; Hendrix V ; Jones C ; Jones M ; Kakalia Z ; Kammer K ; Kersting A ; Maher K ; Merino N ; O'Brien F ; Perzan Z ; Robles E ; Snavely C ; Sorensen P ; Stegen J ; Weisenhorn P ; Whitenack K ; Zavarin M ; Agarwal D (2020): Sample Identifiers and Metadata Reporting Format for Environmental Systems Science. Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE), ESS-DIVE repository. Dataset. doi:10.15485/1660470'.

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

A screenshot of the ESS-DIVE team management interface. The top section shows the team name "ess-dive-data-managers (10 members)". Below this is a list of team members, each with a star icon, a name, and an ORCID URL. The members listed are Madison Burrus (Me), Joan Damerow, Emily Robles, and Hesham Elbashandy. To the right of each member's name is a red "X" icon. Below the list is a pagination bar with "First", "1", "2", "3", and "Last" buttons. The bottom section is titled "Add Member - Search by username, email, or name OR enter a full username below." and contains a search input field with the text "Dylan". A dropdown menu is open below the search field, showing a list of suggestions: "Dylan Projansky", "Dylan Levene", "Dylan O'Ryan", and "Dylan P. O'Ryan". A green "+" button is located to the right of the search input field.

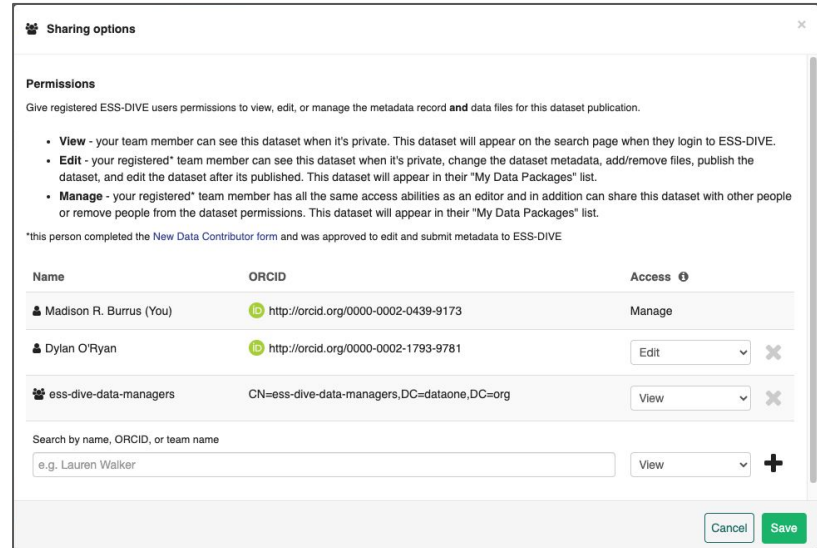
Example of adding someone to a team

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

A screenshot of the 'Sharing options' dialog box in the ESS-DIVE interface. The dialog has a title bar with a gear icon and a close button. It contains a 'Permissions' section with instructions and three bullet points explaining 'View', 'Edit', and 'Manage' permissions. Below this is a table listing team members and their access levels. At the bottom, there is a search bar and a 'Save' button.

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 R. Burrus (You) | 🟢 http://orcid.org/0000-0002-0439-9173 | Manage |
| 👤 Dylan O'Ryan | 🟢 http://orcid.org/0000-0002-1793-9781 | Edit ✕ |
| 👤 ess-dive-data-managers | CN=ess-dive-data-managers,DC=dataone,DC=org | View ✕ |

Search by name, ORCID, or team name

+

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

Pls must initiate the process to setup your project

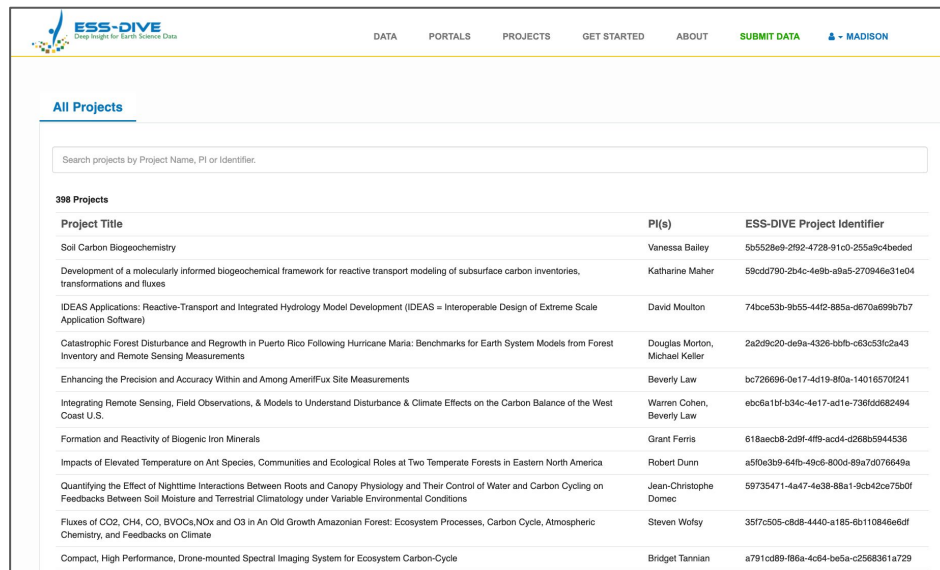
ESS-DIVE's Project List

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.



The screenshot shows the ESS-DIVE website's 'All Projects' page. It features a search bar at the top and a table listing 398 projects. The table columns are Project Title, PI(s), and ESS-DIVE Project Identifier. The projects listed include various topics such as Soil Carbon Biogeochemistry, IDEAS Applications, Catastrophic Forest Disturbance, and Integrating Remote Sensing.

| Project Title | PI(s) | ESS-DIVE Project Identifier |
|---|--------------------------------|--------------------------------------|
| Soil Carbon Biogeochemistry | Vanessa Bailey | 5b5528e9-2f92-4728-91c0-255a9c4beded |
| Development of a molecularly informed biogeochemical framework for reactive transport modeling of subsurface carbon inventories, transformations and fluxes | Katharine Maher | 59cd790-2b4c-4e9b-a9a5-270946e31e04 |
| IDEAS Applications: Reactive-Transport and Integrated Hydrology Model Development (IDEAS = Interoperable Design of Extreme Scale Application Software) | David Moulton | 74bce53b-9b55-4412-885a-d670a899b7b7 |
| Catastrophic Forest Disturbance and Regrowth in Puerto Rico Following Hurricane Maria: Benchmarks for Earth System Models from Forest Inventory and Remote Sensing Measurements | Douglas Morton, Michael Keller | 2a2d9c20-d69a-4326-bbf6-c53c31c2e43 |
| Enhancing the Precision and Accuracy Within and Among AmeriFlux Site Measurements | Beverly Law | bc726696-0e17-4d19-8f0a-14016570241 |
| Integrating Remote Sensing, Field Observations, & Models to Understand Disturbance & Climate Effects on the Carbon Balance of the West Coast U.S. | Warren Cohen, Beverly Law | ebc6a1bf-b34c-4e17-ad1e-736d3682494 |
| Formation and Reactivity of Biogenic Iron Minerals | Grant Ferris | 618a6cb8-2d9f-4f19-acd4-d268b5944536 |
| Impacts of Elevated Temperature on Ant Species, Communities and Ecological Roles at Two Temperate Forests in Eastern North America | Robert Dunn | a5f0e3b9-641b-49c6-800d-89a7d076649a |
| Quantifying the Effect of Nighttime Interactions Between Roots and Canopy Physiology and Their Control of Water and Carbon Cycling on Feedbacks Between Soil Moisture and Terrestrial Climatology under Variable Environmental Conditions | Jean-Christophe Domec | 59735471-4a47-4e38-88a1-9cb420e73b0f |
| Fluxes of CO ₂ , CH ₄ , CO, BVOCs, NO _x and O ₃ in An Old Growth Amazonian Forest: Ecosystem Processes, Carbon Cycle, Atmospheric Chemistry, and Feedbacks on Climate | Steven Wofsy | 35f7c505-c8d8-4440-a185-bb110846e6df |
| Compact, High Performance, Drone-mounted Spectral Imaging System for Ecosystem Carbon-Cycle | Bridget Tannian | a791cd89-186a-4c64-be5a-c2568361a729 |

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

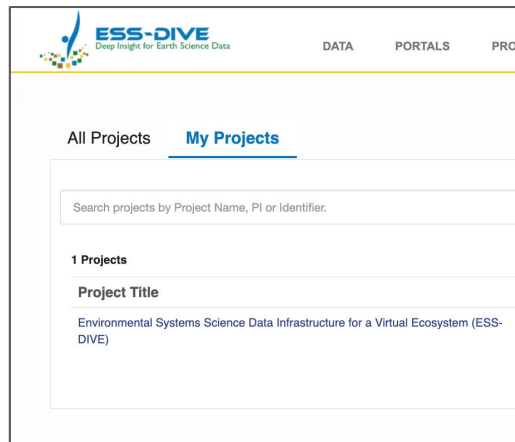
Project Data Managers

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

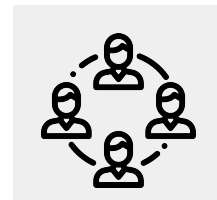


Become a project data manager

★ 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:

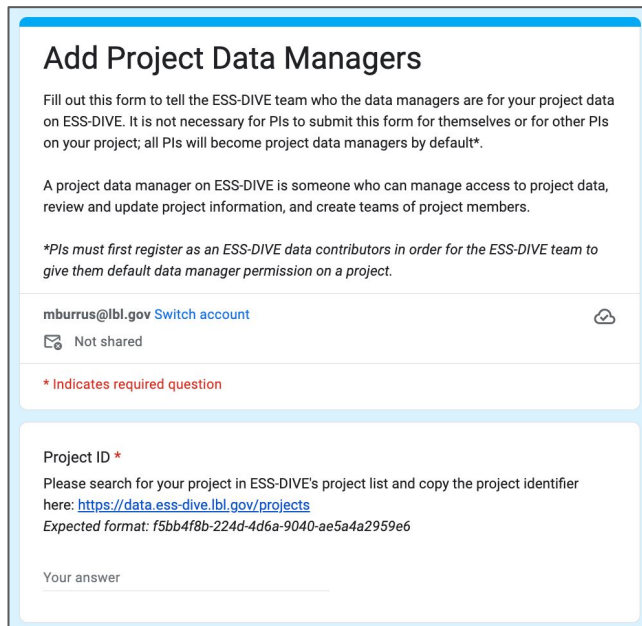
Automatically project data managers

- 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


An orange arrow points from the text "Add Project Manager form" in the list to this screenshot of the form.


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.*

mburris@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

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

Once you become a project manager...



|  ESS-DIVE Deep Insight for Earth Science Data | | | DATA | PORTALS | PROJECTS | GET STARTED | ABOUT | SUBMIT DATA | ▼ MADISON R. |
|--|------------------|--------------------------------------|------|---------|----------|-------------|-------|-------------|--------------|
| All Projects | | | | | | | | | |
| <input type="text" value="Search projects by Project Name, PI or Identifier."/> | | | | | | | | | |
| 399 Projects | | | | | | | | | |
| Project Title | PI(s) | ESS-DIVE Project Identifier | | | | | | | |
| Investigating Bedrock Groundwater Recharge Dynamics in Mountainous Watersheds | Payton Gardner | 33c950db-dd75-4120-bbf0-ddc7f0aa5d6d | | | | | | | |
| Soil Carbon Biogeochemistry | Vanessa Bailey | 5b5528e9-2f92-4728-91c0-255a9c4beded | | | | | | | |
| Formation and Reactivity of Biogenic Iron Minerals | Grant Ferris | 618aecb8-2d9f-4f99-acd4-d268b5944536 | | | | | | | |
| Long-Term Sequestration of Uranium in Iron-Rich Sediment | Craig Criddle | 22948a0a-94fd-41ac-b89f-9a21fce3815f | | | | | | | |
| Connecting AmeriFlux to the Globe, Extending the Partnership with the Global Flux Network, FLUXNET | Dennis Baldocchi | 7da40405-04f1-4da4-a7c7-fd04ea9dfdba | | | | | | | |
| Measurements and Modeling Of CO2 Concentration and Isotopes to Improve Process-Level Understanding of Arctic and Boreal Carbon Cycling | Ralph Keeling | bee89174-ad4d-4098-b5e1-0fa4f26e218a | | | | | | | |
| Scaling from Flux Towers to Ecosystem Models: Regional Constraints on Carbon Cycle Processes from Atmospheric Carbonyl Sulfide | John Campbell | 2f73306d-9a4e-46b2-a1a9-c1f4f461b24c | | | | | | | |
| Climate Change Impacts at the Temperate-Boreal Ecotone: Interactions Between Warming and Precipitation | Peter Reich | 50493429-e8ad-4112-babb-5971908a02d8 | | | | | | | |
| Next-Generation Ecosystem Experiments (NGEE) Tropics | Jeffrey Chambers | a441fe85-5ac3-41b1-bbe5-46df92682609 | | | | | | | |

<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.

The screenshot shows the ESS-DIVE website interface. At the top, there is a navigation bar with links: DATA, PORTALS, PROJECTS, GET STARTED, ABOUT, SUBMIT DATA, and a user profile icon labeled 'MADISON R.'. Below the navigation bar, there are two tabs: 'All Projects' and 'My Projects'. The 'My Projects' tab is highlighted with an orange box. Below the tabs, there is a search bar with the placeholder text 'Search projects by Project Name, PI or Identifier.'. Below the search bar, it says '399 Projects'. A table lists the projects with columns for Project Title, PI(s), and ESS-DIVE Project Identifier.

| Project Title | PI(s) | ESS-DIVE Project Identifier |
|--|------------------|--------------------------------------|
| Investigating Bedrock Groundwater Recharge Dynamics in Mountainous Watersheds | Payton Gardner | 33c950db-dd75-4120-bb10-ddc70aa5d6d |
| Soil Carbon Biogeochemistry | Vanessa Bailey | 5b5528e9-2f92-4728-91c0-255a9c4beded |
| Formation and Reactivity of Biogenic Iron Minerals | Grant Ferris | 618aecb8-2d9f-4ff9-acd4-d268b5944536 |
| Long-Term Sequestration of Uranium in Iron-Rich Sediment | Craig Criddle | 22948a0a-94fd-41ac-b89f-9a21fce3815f |
| Connecting AmeriFlux to the Globe, Extending the Partnership with the Global Flux Network, FLUXNET | Dennis Baldocchi | 7da40405-04f1-4da4-a7c7-fd04ea9dfdba |
| Measurements and Modeling Of CO2 Concentration and Isotopes to Improve Process-Level Understanding of Arctic and Boreal Carbon Cycling | Ralph Keeling | bee89174-ad4d-4098-b5e1-0fa4f26e218a |
| Scaling from Flux Towers to Ecosystem Models: Regional Constraints on Carbon Cycle Processes from Atmospheric Carbonyl Sulfide | John Campbell | 2f73306d-9a4e-46b2-a1a9-c1f4f461b24c |
| Climate Change Impacts at the Temperate-Boreal Ecotone: Interactions Between Warming and Precipitation | Peter Reich | 50493429-e8ad-4112-babb-5971908a02d8 |
| Next-Generation Ecosystem Experiments (NGEE) Tropics | Jeffrey Chambers | a441fe85-5ac3-41b1-bbe5-46d992682609 |
| Incorporating Rhizosphere Interactions and Soil Physical Properties into a Soil Carbon Degradation Model through Experimenting Across Ecotypes | Aimee Classen | 02fd3523-c84f-4275-9662-30099cec3079 |

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

View your project pages



My Projects page

A screenshot of the "My Projects" page on the ESS-DIVE website. The page has a navigation bar with links: DATA, PORTALS, PROJECTS, GET STARTED, ABOUT, SUBMIT DATA, and a user profile icon labeled "MADISON R.". Below the navigation bar, there are tabs for "All Projects" and "My Projects", with "My Projects" being the active tab. A search bar is present with the placeholder text "Search projects by Project Name, PI or Identifier.". Below the search bar, a table lists projects. The table has three columns: "Project Title", "PI(s)", and "ESS-DIVE Project Identifier".

| Project Title | PI(s) | ESS-DIVE Project Identifier |
|--|---|--------------------------------------|
| Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE) | Deborah Agarwal, Charuleka Varadharajan, Shreyas Cholla | IS004f8b-224d-4d6a-9040-ae544e2959e6 |

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

Project Information page

A screenshot of the "Project Information" page for the "Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE)". The page has a navigation bar with links: DATA, PORTALS, PROJECTS, GET STARTED, ABOUT, SUBMIT DATA, and a user profile icon labeled "DYLAN P.". Below the navigation bar, there is a section titled "Project Information" with a sub-section "My Teams". The main content area contains information about the project, including a contact email for updates (ess-dive-support@bi.gov), a list of Principal Investigators (PIs) with their email addresses, a list of Project Data Managers (PDMs) with their ORCID IDs, and a section for the Sponsor Program.

To update project information, contact ESS-DIVE (ess-dive-support@bi.gov).

PRINCIPAL INVESTIGATOR(S)

The Principal Investigator (PI or co-PI) is a primary contact for a project and its data. Projects can have multiple PIs on ESS-DIVE.

Deborah Agarwal, dsagarwal@bi.gov
Charuleka Varadharajan, cvaradharajan@bi.gov
Shreyas Cholla, scholla@bi.gov

PROJECT DATA MANAGER(S)

Project data managers can create and manage teams on the My Teams page. Teams can be used to manage who can access private datasets for a project. PIs who are registered ESS-DIVE data contributors are project data managers by default. Contact ESS-DIVE (ess-dive-support@bi.gov) to add additional project data managers.

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 Elbaashandy - <http://orcid.org/0000-0002-7535-8045>
Shreyas Cholla - <http://orcid.org/0000-0002-4775-8201>

SPONSOR PROGRAM

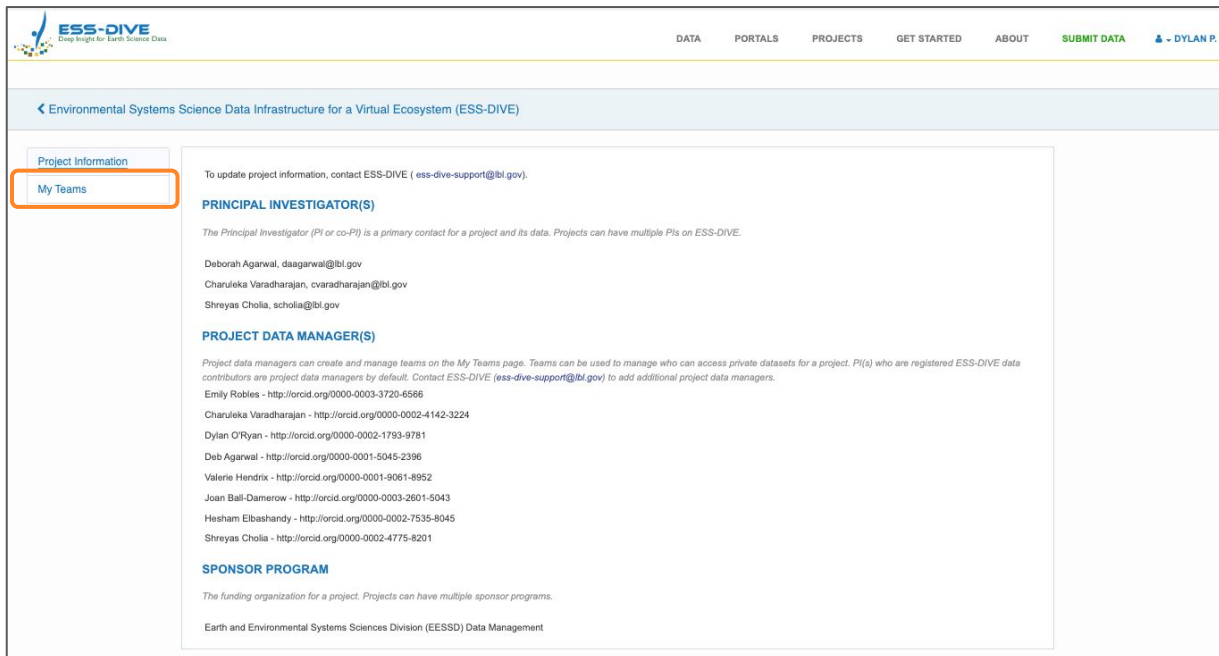
The funding organization for a project. Projects can have multiple sponsor programs.

Earth and Environmental Systems Sciences Division (EESSD) Data Management

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

View your project pages

Project Information page



The screenshot shows the ESS-DIVE website interface. At the top, there is a navigation bar with the ESS-DIVE logo on the left and links for DATA, PORTALS, PROJECTS, GET STARTED, ABOUT, and SUBMIT DATA on the right. A user profile icon labeled 'DYLAN P.' is also present. Below the navigation bar, a light blue banner reads 'Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE)'. On the left side, there is a sidebar with two buttons: 'Project Information' and 'My Teams'. The 'My Teams' button is highlighted with an orange border. The main content area on the right contains the following sections:

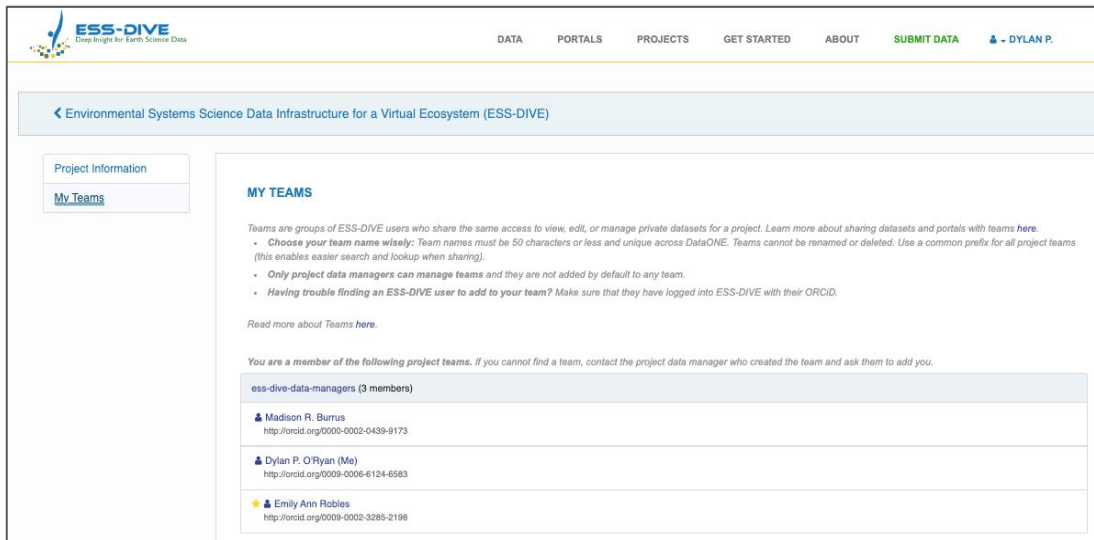
- To update project information, contact ESS-DIVE (ess-dive-support@lbl.gov).**
- PRINCIPAL INVESTIGATOR(S)**
The Principal Investigator (PI or co-PI) is a primary contact for a project and its data. Projects can have multiple PIs on ESS-DIVE.
Deborah Agarwal, daagarwal@lbl.gov
Charuleka Varadharajan, cvaradharajan@lbl.gov
Shreyas Cholia, scholia@lbl.gov
- PROJECT DATA MANAGER(S)**
Project data managers can create and manage teams on the My Teams page. Teams can be used to manage who can access private datasets for a project. PI(s) who are registered ESS-DIVE data contributors are project data managers by default. Contact ESS-DIVE (ess-dive-support@lbl.gov) to add additional project data managers.
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>
- SPONSOR PROGRAM**
The funding organization for a project. Projects can have multiple sponsor programs.
Earth and Environmental Systems Sciences Division (EESSD) Data Management

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

A screenshot of the ESS-DIVE web application. The top navigation bar includes the ESS-DIVE logo, the tagline "Deep insight for Earth Science Data", and links for DATA, PORTALS, PROJECTS, GET STARTED, ABOUT, SUBMIT DATA, and a user profile for "DYLAN P.". Below the navigation bar is a breadcrumb trail: "Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE)". On the left, there are two tabs: "Project Information" and "My Teams", with "My Teams" being the active tab. The main content area is titled "MY TEAMS" and contains explanatory text about teams, a list of instructions for team names and management, and a link to read more. Below this, it states "You are a member of the following project teams. If you cannot find a team, contact the project data manager who created the team and ask them to add you." and lists three team members under the heading "ess-dive-data-managers (3 members)": Madison R. Burrus, Dylan P. O'Riyan (Me), and Emily Ann Robles, each with their ORCID iD.


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

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

Projects can have multiple teams

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

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

PROJECT DATA MANAGER(S)

Project data managers can create and manage teams on the My Teams page. Teams can be created by project data managers by default. Contact ESS-DIVE (ess-dive-support@lbl.gov) for more information.

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>

Teams

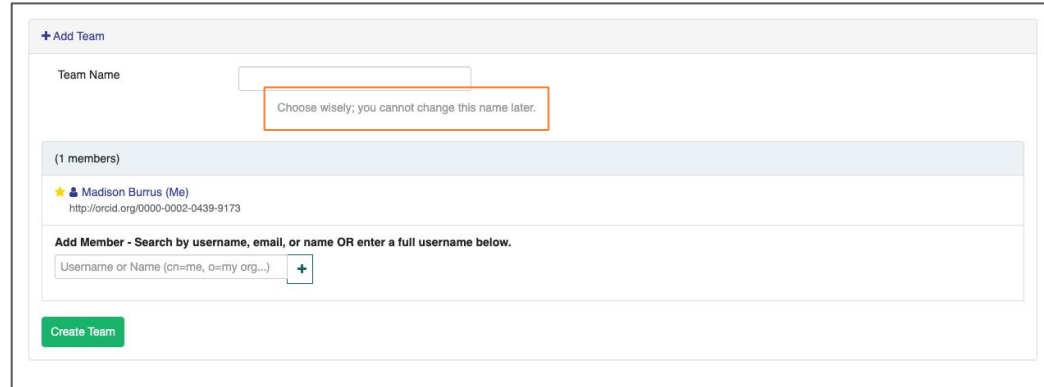
Teams are groups of ESS-DIVE users

- 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

A screenshot of the 'Add Team' form in the ESS-DIVE interface. The form has a title '+ Add Team' in a light grey header. Below the header, there is a 'Team Name' label and an empty text input field. A red rectangular box highlights the input field with the text 'Choose wisely; you cannot change this name later.' below it. Underneath the name field, there is a section for members, starting with '(1 members)' in a light blue bar. Below this, a member is listed: a star icon, a person icon, 'Madison Burrus (Me)', and the ORCID URL 'http://orcid.org/0000-0002-0439-9173'. Below the member list, there is a section titled 'Add Member - Search by username, email, or name OR enter a full username below.' followed by a search input field with the placeholder text 'Username or Name (cn=me, o=my org...)' and a '+' button. At the bottom left of the form is a green 'Create Team' button.

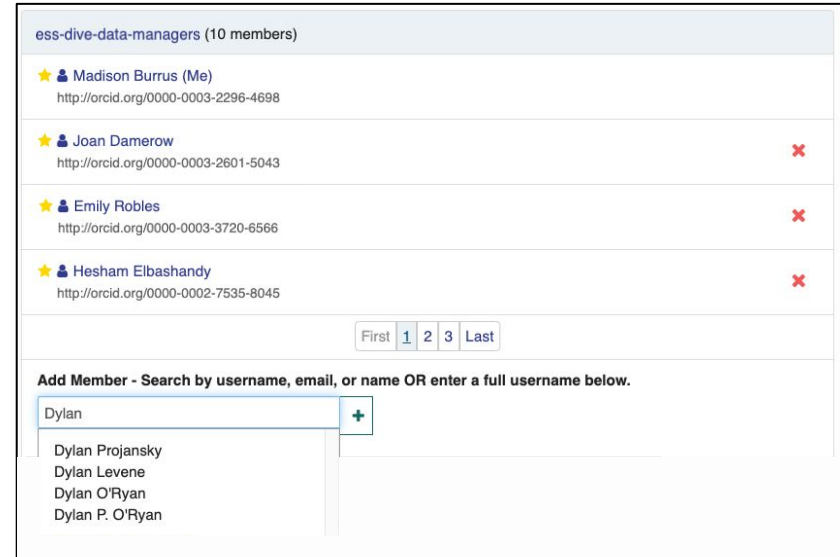
Project data managers can add anyone who has logged into ESS-DIVE to a team

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

A screenshot of the ESS-DIVE team management interface. At the top, it says "ess-dive-data-managers (10 members)". Below this, there is a list of team members, each with a star icon, a name, and an ORCID ID. The members listed are Madison Burrus (Me), Joan Damerow, Emily Robles, and Hesham Elbashandy. To the right of each member's name is a red 'X' icon. Below the list, there is a pagination bar with "First", "1", "2", "3", and "Last". Underneath the pagination bar, there is a section titled "Add Member - Search by username, email, or name OR enter a full username below." This section contains a search input field with the text "Dylan" and a green "+" button. Below the search input, there is a dropdown menu showing a list of suggestions: "Dylan Projansky", "Dylan Levene", "Dylan O'Ryan", and "Dylan P. O'Ryan".

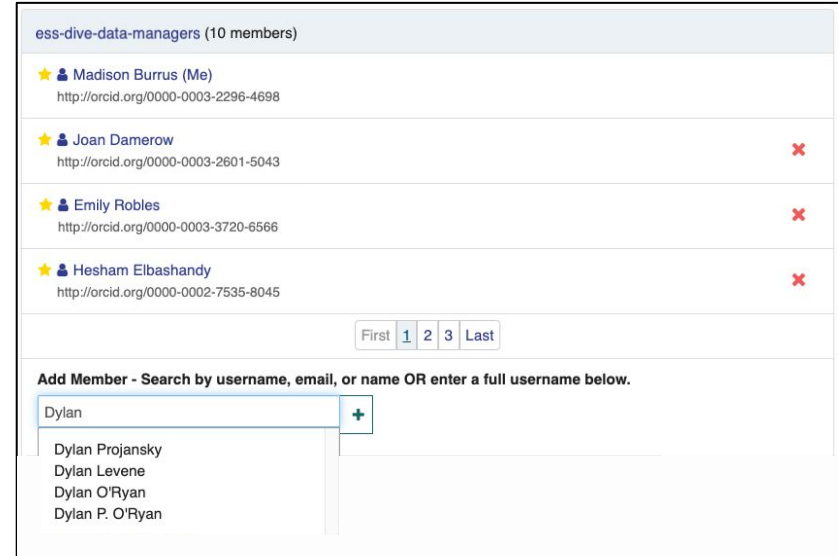
Teams cannot be deleted or renamed

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

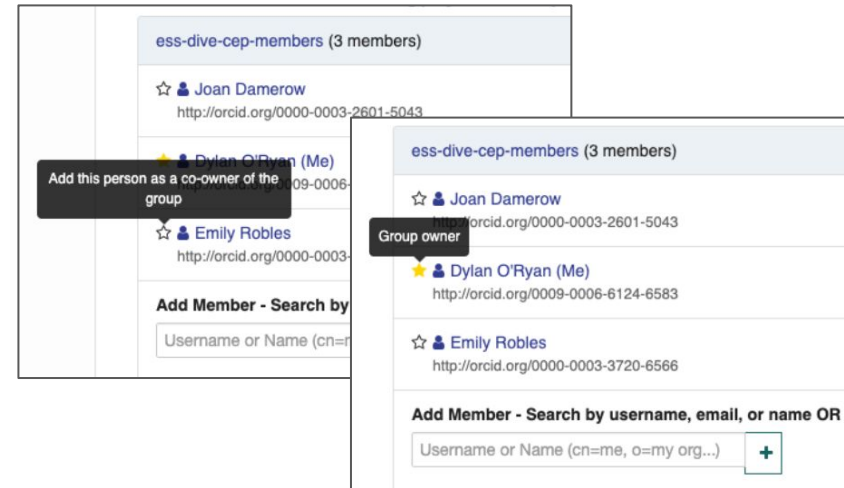
A screenshot of the ESS-DIVE team management interface. At the top, it says "ess-dive-data-managers (10 members)". Below this, there is a list of team members, each with a star icon, a name, and an ORCID ID. The members listed are Madison Burrus (Me), Joan Damerow, Emily Robles, and Hesham Elbashandy. To the right of each member's name is a red 'X' icon. Below the list, there is a pagination bar with "First", "1", "2", "3", and "Last". Underneath the pagination bar, there is a section titled "Add Member - Search by username, email, or name OR enter a full username below." This section contains a search input field with the text "Dylan" and a green "+" button. Below the search input, there is a dropdown menu showing suggestions: "Dylan Projansky", "Dylan Levene", "Dylan O'Ryan", and "Dylan P. O'Ryan".

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



The screenshot illustrates the process of adding co-owners to a team. It shows two overlapping panels of the 'ess-dive-cep-members' team page.

Left Panel (Initial State): The team 'ess-dive-cep-members (3 members)' has one owner, Joan Damerow, marked with a star icon. Below her is a search bar labeled 'Add Member - Search by' with the placeholder text 'Username or Name (cn=...)'.

Right Panel (After Adding Co-owners): The same team page is shown, but now it has three members: Joan Damerow (star icon), Dylan O'Ryan (Me) (star icon), and Emily Robles (star icon). A callout bubble points to the star icon on Dylan O'Ryan's name, stating 'Add this person as a co-owner of the group'. Another callout bubble points to the star icon on Emily Robles's name, stating 'Group owner'.

Bottom Panel (Search Bar): A separate view of the search bar is shown at the bottom, with the text 'Add Member - Search by username, email, or name OR' and a search input field with the placeholder 'Username or Name (cn=me, o=my org...)' and a green plus icon.

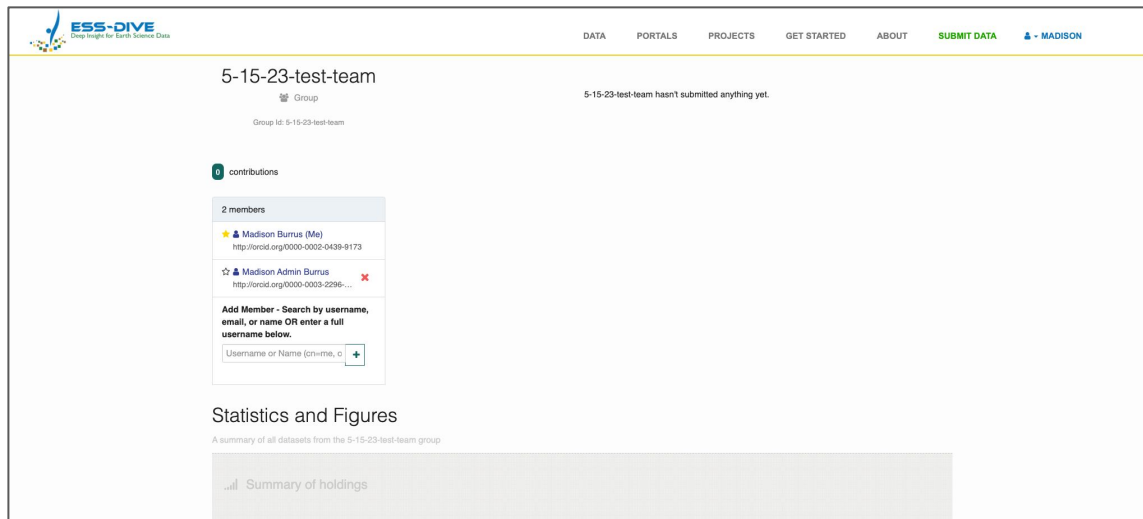
Sharing datasets with teams

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

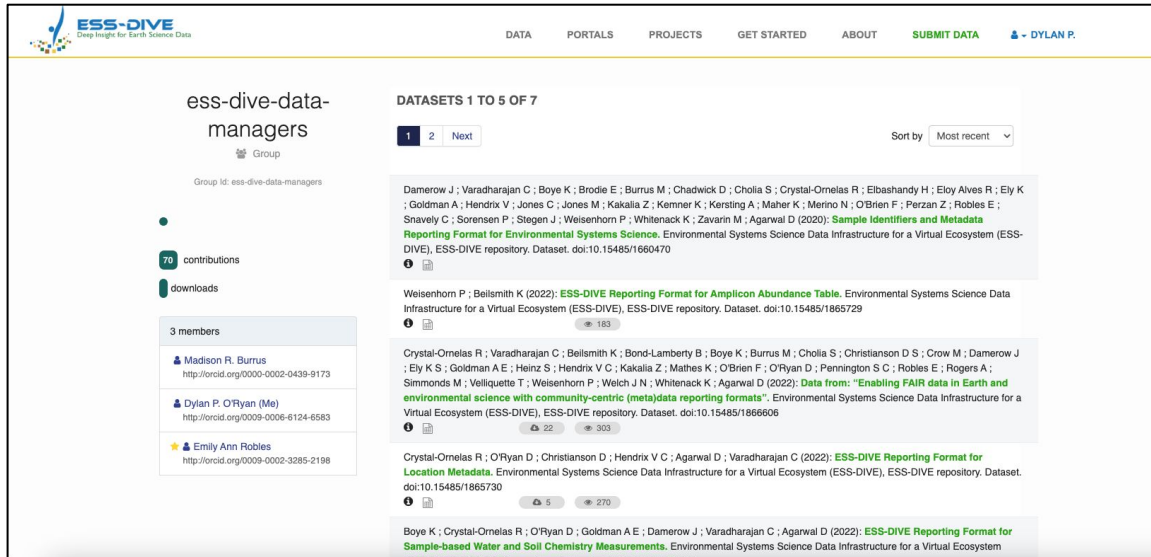


Example of a test team on Sandbox

Sharing datasets with teams

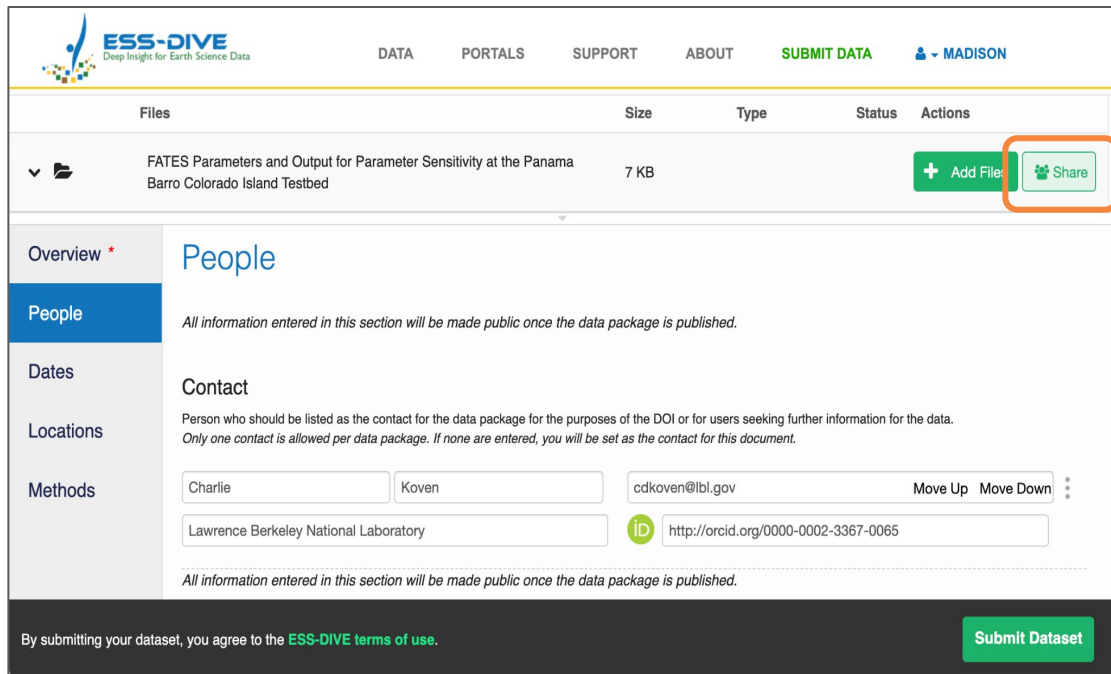
Data contributors should start sharing with data managers **at the time they submit a new dataset**

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

A screenshot of the ESS-DIVE website showing a team profile for "ess-dive-data-managers". The page has a navigation bar at the top with links: DATA, PORTALS, PROJECTS, GET STARTED, ABOUT, SUBMIT DATA, and a user profile for "DYLAN P.". The team profile section on the left shows the group name, group ID, 70 contributions, and 3 members: Madison R. Burrus, Dylan P. O'Ryan (Me), and Emily Ann Robles. The main content area displays a list of datasets, with the first one being "Damerow J ; Varadharajan C ; Boye K ; Brodie E ; Burrus M ; Chadwick D ; Cholla S ; Crystal-Omelas R ; Elbashandy H ; Eloy Alves R ; Ely K ; Goldman A ; Hendrix V ; Jones C ; Jones M ; Kakalia Z ; Kemner K ; Kersting A ; Maher K ; Merino N ; O'Brien F ; Perzan Z ; Robles E ; Snavely C ; Sorensen P ; Stegen J ; Weisenhorn P ; Whitenack K ; Zavarin M ; Agarwal D (2020): Sample Identifiers and Metadata Reporting Format for Environmental Systems Science. Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE), ESS-DIVE repository, Dataset. doi:10.15485/1660470". The second dataset is "Weisenhorn P ; Beilsmith K (2022): ESS-DIVE Reporting Format for Amplicon Abundance Table. Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE), ESS-DIVE repository, Dataset. doi:10.15485/1865729". The third dataset is "Crystal-Omelas R ; Varadharajan C ; Beilsmith K ; Bond-Lamberty B ; Boye K ; Burrus M ; Cholla S ; Christianson D S ; Crow M ; Damerow J ; Ely K S ; Goldman A E ; Heinz S ; Hendrix V C ; Kakalia Z ; Mathes K ; O'Brien F ; O'Ryan D ; Pennington S C ; Robles E ; Rogers A ; Simmonds M ; Velliquette T ; Weisenhorn P ; Welch J N ; Whitenack K ; Agarwal D (2022): Data from: "Enabling FAIR data in Earth and environmental science with community-centric [metadata reporting formats]". Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE), ESS-DIVE repository, Dataset. doi:10.15485/1866606". The fourth dataset is "Crystal-Omelas R ; O'Ryan D ; Christianson D ; Hendrix V C ; Agarwal D ; Varadharajan C (2022): ESS-DIVE Reporting Format for Location Metadata. Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE), ESS-DIVE repository, Dataset. doi:10.15485/1865730". The fifth dataset is "Boye K ; Crystal-Omelas R ; O'Ryan D ; Goldman A E ; Damerow J ; Varadharajan C ; Agarwal D (2022): ESS-DIVE Reporting Format for Sample-based Water and Soil Chemistry Measurements. Environmental Systems Science Data Infrastructure for a Virtual Ecosystem".

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

Sharing datasets with teams



The screenshot shows the ESS-DIVE web interface. At the top is a navigation bar with links: DATA, PORTALS, SUPPORT, ABOUT, SUBMIT DATA, and a user profile for MADISON. Below this is a table of datasets. The first dataset is "FATES Parameters and Output for Parameter Sensitivity at the Panama Barro Colorado Island Testbed", which is 7 KB in size. In the "Actions" column for this dataset, there is a green "Add Files" button and a green "Share" button. An orange box highlights the "Share" button, with an orange arrow pointing from it to a larger, isolated "Share" button on the right. Below the table, there is a section for "People" where contact information can be entered. This section includes a "Contact" field with a description: "Person who should be listed as the contact for the data package for the purposes of the DOI or for users seeking further information for the data. Only one contact is allowed per data package. If none are entered, you will be set as the contact for this document." There are input fields for "Name" (containing "Charlie"), "Email" (containing "cdkoven@lbl.gov"), and "Institution" (containing "Lawrence Berkeley National Laboratory"). There is also an "ORCID iD" field with the URL "http://orcid.org/0000-0002-3367-0065". At the bottom of the page, there is a "Submit Dataset" button and a footer note: "By submitting your dataset, you agree to the ESS-DIVE terms of use."

| Files | Size | Type | Status | Actions |
|--|------|------|--------|------------------|
| ▼ FATES Parameters and Output for Parameter Sensitivity at the Panama Barro Colorado Island Testbed | 7 KB | | | Add Files Share |

People

All information entered in this section will be made public once the data package is published.

Contact

Person who should be listed as the contact for the data package for the purposes of the DOI or for users seeking further information for the data. Only one contact is allowed per data package. If none are entered, you will be set as the contact for this document.

Charlie Koven cdkoven@lbl.gov Move Up Move Down

Lawrence Berkeley National Laboratory http://orcid.org/0000-0002-3367-0065

All information entered in this section will be made public once the data package is published.

By submitting your dataset, you agree to the [ESS-DIVE terms of use](#).



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

Permission Types

Viewer

- **view** private datasets

Editor

- **view** private datasets
- **edit** metadata
- **add/remove** files
- **publish** datasets

Manager

- **view** private datasets
- **edit** metadata
- **add/remove** files
- **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 and private datasets 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 is 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?



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 is a temporary web site for testing and tutorials only. Click [here](#) for the production ESS-DIVE data archive.

✕

Need help? Email us at ess-dive-support@lbl.gov

**ESS-DIVE**
Deep Insight for Earth Science Data

[DATA](#) [PORTALS](#) [SUPPORT](#) [ABOUT](#) [SUBMIT DATA](#)

 Sign in with Orcid

Search ?

DATASETS 1 TO 25 OF 42

Hide Map »

This webinar uses a fake project on Sandbox



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

This is a temporary web site for testing and tutorials only. Click [here](#) for the production ESS-DIVE data archive.

Need help? Email us at ess-dive-support@lbl.gov

ESS-DIVE
Deep insight for Earth Science Data

DATA PORTALS PROJECTS GET STARTED ABOUT **SUBMIT DATA** [- MADISON](#)

All Projects **My Projects**

Search projects by Project Name, PI or Identifier.

2 Projects

| Project Title | PI(s) | ESS-DIVE Project Identifier |
|--|---|--------------------------------------|
| Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE) | Deborah Agarwal, Charuleka Varadharajan, Shreyas Cholia | 15bb4f8b-224d-4d6a-9040-ae5a4a2959e6 |
| ESS-DIVE June 2023 Webinar | Madison Burrus | 3771b58a-4560-4c7f-8ba6-cf66f08052f9 |

<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










DATA PORTALS SUPPORT ABOUT **SUBMIT DATA**  MADISON

Longhi Cordeiro A; Valverde-Barrantes O; Obilatas E; Gonçalves N; Andersen K; Quesada C; Norby R (2021): Fine-root production, mortality, and standing stock from minirhizotron measurements, AmazonFACE site, Brazil. Next-Generation Ecosystem Experiments (NGEE) Tropics, **ESS-DIVE repository**. Dataset. [ess-dive-bd5e568a9516834-20210610T055305528894](https://data.ess-dive.lbl.gov/datasets/ess-dive-bd5e568a9516834-20210610T055305528894) accessed via <https://data.ess-dive.lbl.gov/datasets/ess-dive-bd5e568a9516834-20210610T055305528894> on 2021-11-19


To submit a new data package or make major revisions to an existing data package

1. Add files
2. Enter the required * fields in the sections below
3. Hit the submit button, which appears after the first metadata entry

| Files | Size | Type | Status | Actions |
|--|---------|------|---|--|
|  Fine-root production, mortality, and standing stock from minirhizotron measurements, AmazonFACE site, Brazil | 7 KB | |  Add Files |  Share |
|  AmazonFACE_data_20190513170350.zip | 2.77 MB | Data | |  Remove |

Overview

Overview

By submitting your dataset, you agree to the [ESS-DIVE terms of use](#). 

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

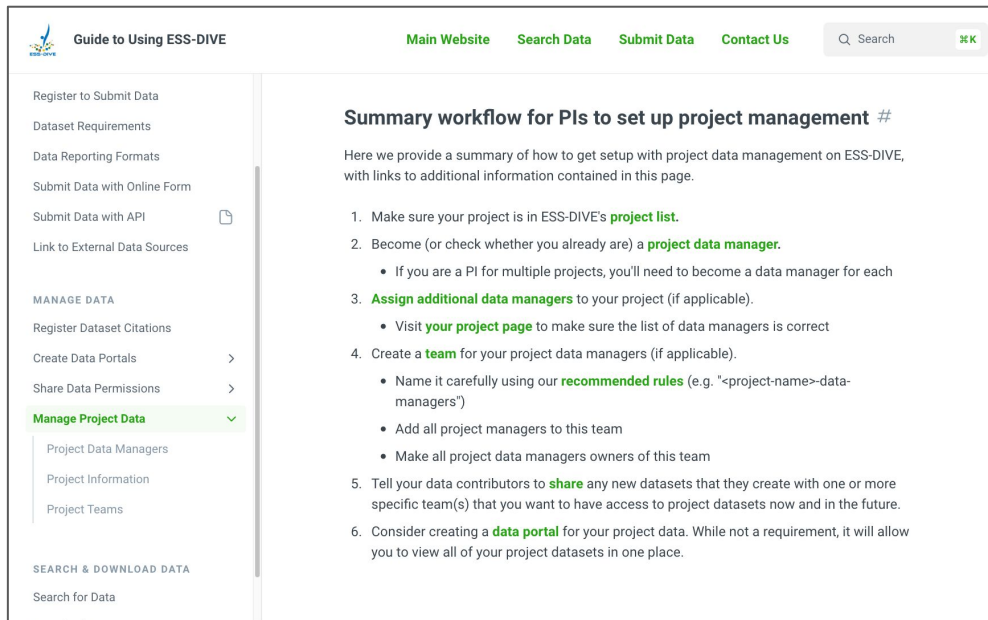
Review the project management set up steps

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!

The screenshot shows a web page titled "Guide to Using ESS-DIVE". At the top, there are navigation links: "Main Website", "Search Data", "Submit Data", and "Contact Us". A search bar is on the right. The left sidebar contains a list of links: "Register to Submit Data", "Dataset Requirements", "Data Reporting Formats", "Submit Data with Online Form", "Submit Data with API", "Link to External Data Sources", "MANAGE DATA", "Register Dataset Citations", "Create Data Portals", "Share Data Permissions", "Manage Project Data" (highlighted with a green bar and a dropdown arrow), "Project Data Managers", "Project Information", "Project Teams", "SEARCH & DOWNLOAD DATA", and "Search for Data". The main content area is titled "Summary workflow for PIs to set up project management #" and contains a paragraph followed by a numbered list of six steps. Step 1: "Make sure your project is in ESS-DIVE's project list." Step 2: "Become (or check whether you already are) a project data manager." with a sub-bullet: "If you are a PI for multiple projects, you'll need to become a data manager for each". Step 3: "Assign additional data managers to your project (if applicable)." with a sub-bullet: "Visit your project page to make sure the list of data managers is correct". Step 4: "Create a team for your project data managers (if applicable)." with sub-bullets: "Name it carefully using our recommended rules (e.g. '<project-name>-data-managers')", "Add all project managers to this team", and "Make all project data managers owners of this team". Step 5: "Tell your data contributors to share any new datasets that they create with one or more specific team(s) that you want to have access to project datasets now and in the future." Step 6: "Consider creating a data portal for your project data. While not a requirement, it will allow you to view all of your project datasets in one place."

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://twitter.com/essdive)

<https://bit.ly/essdiveMailingList>



Acknowledgements

Advisory Groups: ESS-DIVE Archive Partnership Board, ESS Cyberinfrastructure Working Groups

Funding: EESSD Data Management