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*
<table>
<thead>
<tr>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Scientist/Data Collector</td>
</tr>
<tr>
<td>Lab Scientist/Data Analyzer</td>
</tr>
<tr>
<td>Data Manager</td>
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<tr>
<td>Data User</td>
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<tr>
<td>PI</td>
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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

Gain access to your project page

Create teams for your project

⭐ Requires PI approval
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
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.

https://data.ess-dive.lbl.gov/projects
View your project pages

**My Projects page**

<table>
<thead>
<tr>
<th>Project Title</th>
<th>PI(s)</th>
<th>ESS-DIVE Project Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental Systems Science Data Infrastructure for a Virtual Ecosystem (ESS-DIVE)</td>
<td>Debrah Avgar, Charbel Harashama, Shripal Chhita</td>
<td>dde编r-hh哈n-a学, 而而 neral Chhita</td>
</tr>
</tbody>
</table>

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

To update project information, contact ESS-DIVE: ess-dive-support@ift.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.

Deziern Agenova, des@inft.gov
Charulika Varadhachary, cvaradh@ift.gov
Shreeya Chikes, svshadow@ift.gov

PROJECT DATA MANAGER(S)
Project data managers can create and manage teams on the My Teams page. Teams can be used to organize who has access to private datasets for a project. PIs and co-PIs can designate project team managers.

Emily Roberts - http://orcid.org/0000-0003-3725-6966
Charulika Varadhachary - http://orcid.org/0000-0002-1423-3234
Shreeya Chikes - http://orcid.org/0000-0002-1793-9791
Deziern Agenova - http://orcid.org/0000-0001-5965-2196
Valerie Hendrix - http://orcid.org/0000-0001-8961-8852
Joan Ball-Damerow - http://orcid.org/0000-0003-2801-5340
Whitney Ebsworth - http://orcid.org/0000-0002-7535-4045
Shreeya Chikes - http://orcid.org/0000-0002-4779-8371

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

Earth and Environmental Systems Science Division (ESSSSD) 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.

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.

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

*Example of a team*

**ess-dive-data-managers (3 members)**

- Madison R. Burrus (Me)
  - http://orcid.org/0000-0002-0439-9173
- Dylan P. O’Ryan
  - http://orcid.org/0000-0005-8124-0583
- Emily Ann Robles
  - http://orcid.org/0000-0002-3285-2198

**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.
- Emily Robles - http://orcid.org/0000-0003-3720-8566
- Chariuliee Varadhajan - http://orcid.org/0000-0002-4142-3224
- Dylan O’Ryan - http://orcid.org/0000-0002-1763-9781
- Deb Agarwal - http://orcid.org/0000-0001-5045-2396
- Valerie Hendrix - http://orcid.org/0000-0001-5081-8892
- Joan Bell-Danner - http://orcid.org/0000-0003-2601-5043
- Hesham Elbashandy - http://orcid.org/0000-0003-7638-4045
- Shreyas Cholia - http://orcid.org/0000-0002-4775-8291
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**
- 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.

Icons from https://www.flaticon.com/authors/juicy-fish and https://www.flaticon.com/authors/freepik
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.

This webinar uses a fake project on Sandbox

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

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
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

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