What is the Portage Network?

“Portage is a CARL-sponsored national network of Research Data Management experts working collaboratively to build capacity and better coordinate RDM activities in Canada”
Goals of the Portage Network

• Build a **community of practice** for research data management (RDM)

• Engage and advocate for research data management with **stakeholder communities**

• Facilitate and provide leadership in the **development of RDM infrastructure**
Based on a National Network of Experts

Expert Groups
- Data Management Planning
- Curation
- Data Discovery
- Preservation
- Training
- Research Intelligence

Working Groups
- Dataverse North WG
- Responsible Research Data Management Practices for Sensitive Data
- FRDR Service Model WG
- FRDR Discovery Service WG
- Institutional RDM Strategies WG

White Papers:
Collections, Training, Discovery, Preservation, along with many other reports & resources…
New Working Group on Sensitive Data

Expert Groups

- Data Management Planning
- Curation
- Data Discovery
- Preservation
- Training
- Research Intelligence

Working Groups

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http://ors.umkc.edu/research-compliance-(iacuc-ibc-irb-rsc)/institutional-review-board-(irb)/research-subject-participant-information-and-resources
But there are many other issues with sensitive data

First Nations Data

Métis Data

Inuit Data

General Data Protection Regulation
Four priority outcomes identified...

- Deposit-friendly text for ethics applications & informed consent
- Data access agreements
- Training materials
- Environmental scan of best practices for Indigenous data
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Levels of Stakeholder Engagement

- LOCAL
- REGIONAL/PROVINCIAL
- NATIONAL

Libraries ➔ Researchers
Graduate Studies ➔ IT
Ethics ➔ Research Services
Levels of Stakeholder Engagement

LOCAL

REGIONAL/PROVINCIAL

NATIONAL

Canada’s four regional library consortia
Levels of Stakeholder Engagement

- LOCAL
- REGIONAL/PROVINCIAL
- NATIONAL

Diagram showing levels of engagement with stakeholders such as Libraries, Researchers, IT, Graduate Studies, Ethics, and Research Services. The diagram also includes a map of Canada and mentions regional consortia like COPPUL, OCUL, and CAUL/CBUA. The central part of the diagram is labeled "DIGITAL RESEARCH ECOSYSTEM" with sectors for Researchers, Institutions/Organizations, CAREB, Social Sciences and Humanities Research Council (SSHRC), Business, Industry, and Government, and the Research Council of the Social Sciences and Humanities (HEC-SSHRC).
Levels of Stakeholder Engagement

LOCAL

REGIONAL/PROVINCIAL

NATIONAL

- Libraries
- Researchers
- IT
- Graduate Studies
- Ethics
- Research Services

Canada’s four regional library consortia

DIGITAL RESEARCH ECOSYSTEM

- Researchers
- Institutions/Organizations
- CAREB
- Society
- CFI
- Federal Departments & Agencies
- Provinces
- CARL Portage
- CANARIE
- Compute Canada
- CASRAI
- Research Data Canada
- SBDA
- Open Science Policy
- ISED
- LCDRI

Direction
Use
Support

Portage

Services

Tri-Council

COPPUL

CUL

LOCAL

NATIONAL
Goals of the Portage Network

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Researcher’s Perspective…

Tri-Agency RDM Policy

https://thenounproject.com/
1. **Raise awareness**: about benefits of best practices and emerging policy requirements.

2. **Assess institutional readiness**: to manage and realize the potential of data holdings.

3. **Formalize RDM practices**: through the development and/or adoption of guidelines, best practices, and policies – setting the tone and underscoring institutional commitment and expectations.

4. **Define a roadmap**: to help with capacity-building over the medium term, to ensure research excellence, efficiency, and transparency.
1. Data collection
2. Documentation & metadata
3. Backup & storage
4. Preservation
5. Data sharing & reuse
6. Responsibilities & resources
7. Ethics & legal compliance

DMP Assistant 2.0
Coming Soon

https://assistant.portagenetwork.ca/en
Migration to a new DMP Codebase

Portage DMP Assistant 2.0

Based on single, open-source platform: DMP Roadmap

Joint initiative:
• Digital Curation Centre
• University of California Curation Centre

New features:
• Provides foundation for machine actionable DMPs
• Supports DMPs as “living documents”
• Supports use of ORCID IDs
• Includes APIs for creating and sharing DMPs
• Supports researchers ‘opting in’ to share their DMP
"I suspect there isn’t that much use of the DMP Assistant right now... in proportion to the number of researchers, but it’s a chicken and egg situation"

"if it is not required, even though it’s a good practice, not that many will build a DMP"

37 institutional accounts
~3000 registered users

May, 2018

https://fundingsage.com/personnel-and-organization-chicken-or-the-egg/
Researcher’s Perspective…

Portage
National Repository
Options & Coordination
…along with Domain-specific
Repositories

Federated RDM Architecture

https://thenounproject.com/
Federated RDM Architecture... the Portage vision

Federated RDM Architecture

Active Storage

Repository Storage

Preservation Storage
For more on the Portage vision for a Federated RDM Architecture over to Lee Wilson, Portage Service Manager…
Federated Architecture

Council of Prairie & Pacific University Libraries
Ontario Council of University Libraries
Researchers
Federated Architecture

Regional/Institutional Repositories
Discipline-specific Repositories

Research data & metadata
Deposit & Download

Researchers

Portage: Dataverse North
Regional/Institutional instances of Dataverse

Repository Storage
Active Storage
Federated Architecture:
Repository Options

Main Features:

Mature platform
Widely adopted
User-friendly
Brandable

Possible National Repository Option

Dataverse used widely in Canada with 1000’s of data files deposited
... Dalhousie & Abacus

Dalhousie University Dataverse (Dalhousie University)

Abacus Dataverse Network

UBC, SFU, UNBC, & UVic
Federated Architecture

- Portage: Federated Research Data Repository (FRDR)
- Portage: Dataverse North
- Regional/Institutional instances of Dataverse
- Regional/Institutional Repositories
- Discipline-specific Repositories
- Repository Storage
- Research data & metadata Deposit & Download

BIG data

Researchers

Active Storage
Main Features:

- 'Big Data' upload/download
- Maintains file hierarchies
- National Discovery Platform
- National Repository Option
- Preservation Processing capacity

Currently in Limited Production

Strategic Relevance

Fits into broader Portage vision for Preservation

Strategic partnership with Compute Canada (HPC/ARC)

Fills key gaps in the RDM ecosystem

https://portagenetwork.ca/frdr-dfdr
Federated Architecture

- National Discovery Layer
- Metadata harvested into FRDR
- Portage: Dataverse North
- Federated Research Data Repository (FRDR)
- Regional/Institutional instances of Dataverse
- Repository Storage
- Regional/Institutional Repositories
- Discipline-specific Repositories
- BIG data
- Researchers
- Active Storage
- Deposit & Download

Research data & metadata
Federated Architecture

Preservation processing

National Discovery Layer

Metadata harvested into FRDR

Archival Storage

Repository Storage

Federated Research Data Repository (FRDR)

Regional/Institutional instances of Dataverse

Portage

Dataverse North

Regional/Institutional Repositories

Discipline-specific Repositories

Portage: Dataverse North

Research data & metadata Deposit & Download

Active Storage

Researchers

BIG data

COPPUL

BCI

OCUL

CAUL

CBUA

Council of Prairie & Pacific University Libraries

Ontario Council of University Libraries

Portage

Researchers
Federated Architecture

Preservation processing

National Discovery Layer

Metadata harvested into FRDR

Federated Research Data Repository (FRDR)

Regional/Institutional instances of Dataverse

Repository Storage

Research data & metadata Deposit & Download

Researchers

Archival Storage

Preservation Processing via Archivematica

Generation of Archival Information Packages (AIPs)

Storage in a Network of Preservation Service Providers

ONTARIO LIBRARY RESEARCH CLOUD

COPPUL | Council of Prairie and Pacific University Libraries
WestVault
Data Storage Continuum

CONTINUUM OF RESEARCH DATA STORAGE

Research Lifecycle from a storage perspective

ACTIVE STORAGE
Controlled
Working copy Short-term for duration of project
Completing research

REPOSITORY STORAGE
Open (as appropriate)
Dissemination copy Medium-term, beyond duration of project
Discovery & Access

ARCHIVAL STORAGE
Open (as appropriate)
Preservation copy Long-term
Disaster recovery/Copy of last resort

ACCESS:

STORAGE PURPOSE:

USE:
And there are other RDM activities that happen along with ‘storage’
The Story Continues…

- Work with the Preservation Expert Group to create a network of Preservation Service Providers (PSPs)
- Develop a nationally coordinated, regionally distributed network of curation support services
- Build tools and services for “active” data curation
- Implement a geospatial discovery layer
- Integrate Portage services on a single, end-user facing platform
Questions?

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