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Docuteam packer

Viewer and editor for file structures and metadata

Other Conference Item

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ETH BIBLIOTHEK

OPEN RESEARCH DATA, EPFL, 28 October 2014, M. Töwe, M. Bärlocher

docuteam packer: viewer and editor for file structures and metadata

Overview

- **Aim of the Workshop**
- ***docuteam packer***
  - Purposes and limitations
  - Use cases
  - Configuration
- **Demo**
- **Testing**

  (Link to download: http://download.library.ethz.ch/docuteam-packer/)

Download

- http://download.library.ethz.ch/docuteam-packer/

Index of /docuteam-packer

Name	Last modified	Size	Description
Parent Directory		-	
Manual_docuteam_packer_Workshop.pdf	24-Oct-2014 11:54	1.5M	Manual in German
Manual_docuteam_packer_en.pdf	27-Oct-2014 15:40	1.3M	Manual in English
ooo.zip	10-Dec-2013 14:49	333M	Optional Open Office, for file preview only
packer_portable.zip	24-Oct-2014 14:15	38M	Application

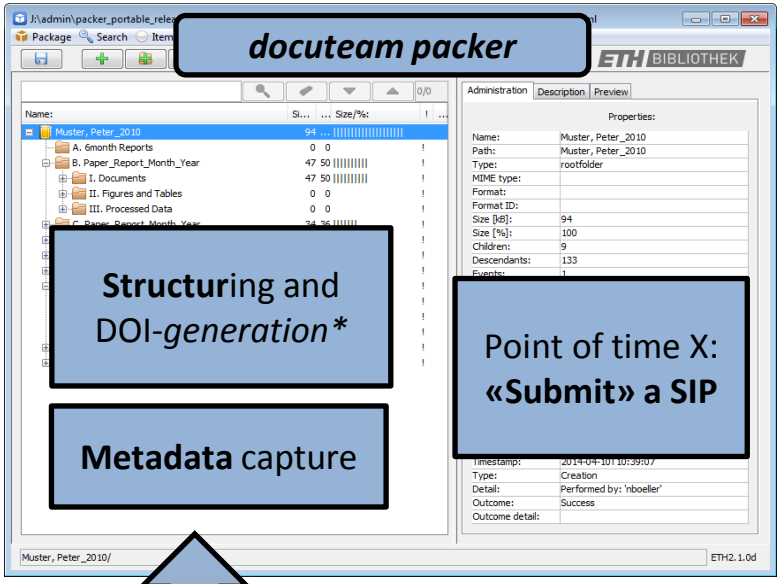
Aims of the workshop

- **Aims of using *docuteam packer*** are clear
- Participants have a rough understanding of the tool's **strengths and limitations**
- **Technical prerequisites** for using the tool are known

Workflow «Small Data»

Selection and documentation of context | **Curation and usability** | **Bitstream preservation**

Researchers | **Library** | **IT-Services**



Filesystem (networked, local)
Selection for archiving

Sub-mission

docuteam feeder

ETH Data Archive

Server

Storage

Network

Delivery via DOI

Access via Knowledge Portal

What is *docuteam packer*?

For users

- **Viewer and editor for local preparation of archival packages for transfer to ETH Data Archive**
  - Create and edit folder structure, as it should be reflected in ETH Data Archive
  - Enter and edit metadata
  - DOI-creation (Digital Object Identifier; to be registered by ETH Data Archive)
  - Assign access rights and retention periods to be enforced by ETH Data Archive

In the background

- Create a **Submission Information Package (SIP)** or Archival Information Package (AIP) **of metadata + structure (METS-format,** Metadata Encoding and Transmission Standard) **and data**

What *docuteam packer* is not!

- **No comprehensive data management solution**
- **No records management solution**
- **No collaboration platform**
- **No data repository**
- **No long term archive** - but a tool to **prepare** for and submit to archive
- **No solution for *local* rights management**
- **Not tied to use with Rosetta** as the only long term archive

➢ ***Consider alternative approaches*** *where these are more appropriate*

➢ ***Be careful with using the tool without submitting to an archive***

Example Use Cases

Research groups

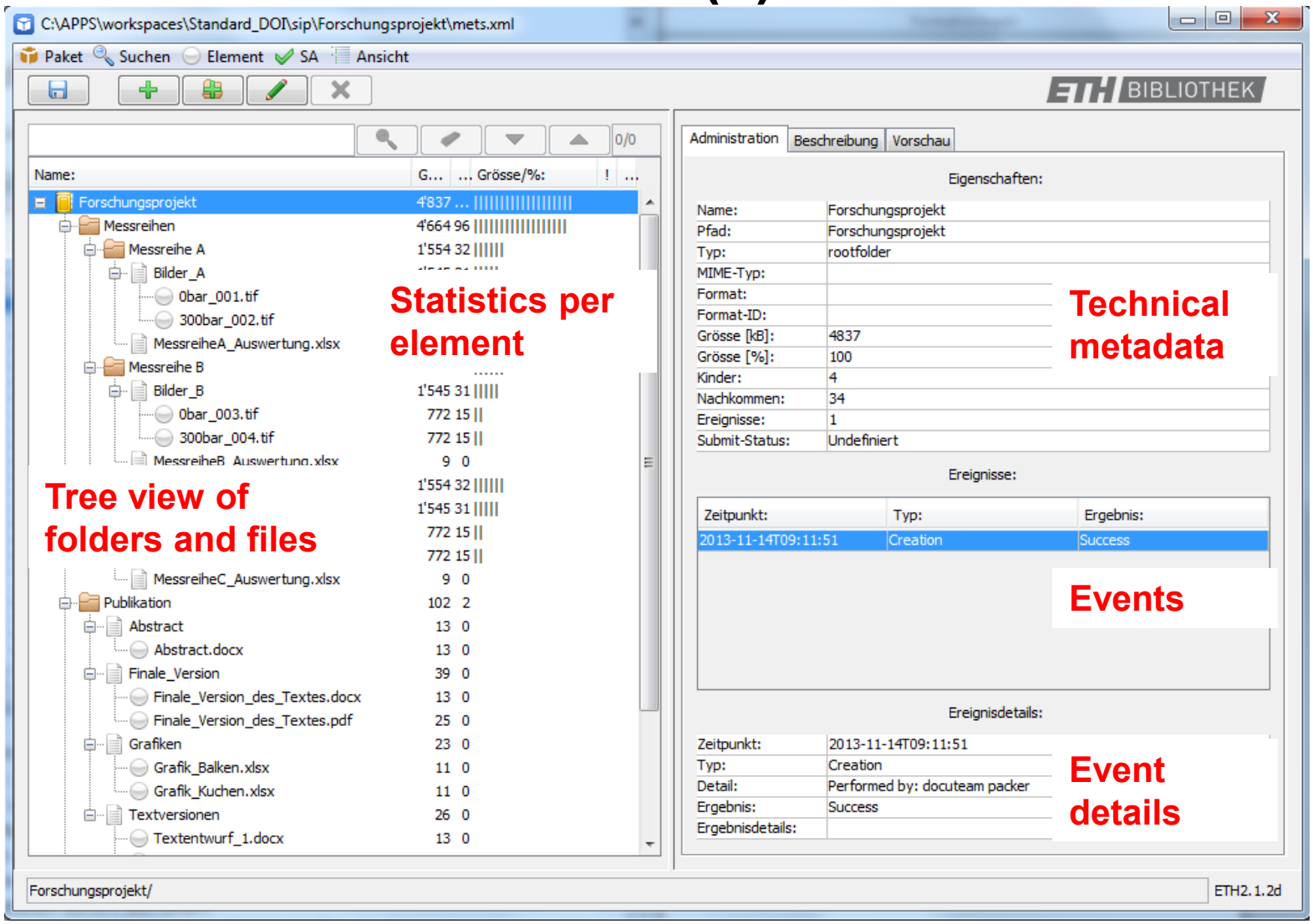
- **Data belonging to a manuscript** are collected, submitted to the long term archive and made accessible via DOI for reviewers and readers
- **Research group has a structured filing** without metadata; it should be edited and submitted into the long term archive
- **PhD students** of a group **are presented with a filing structure** they should follow when managing their data

…

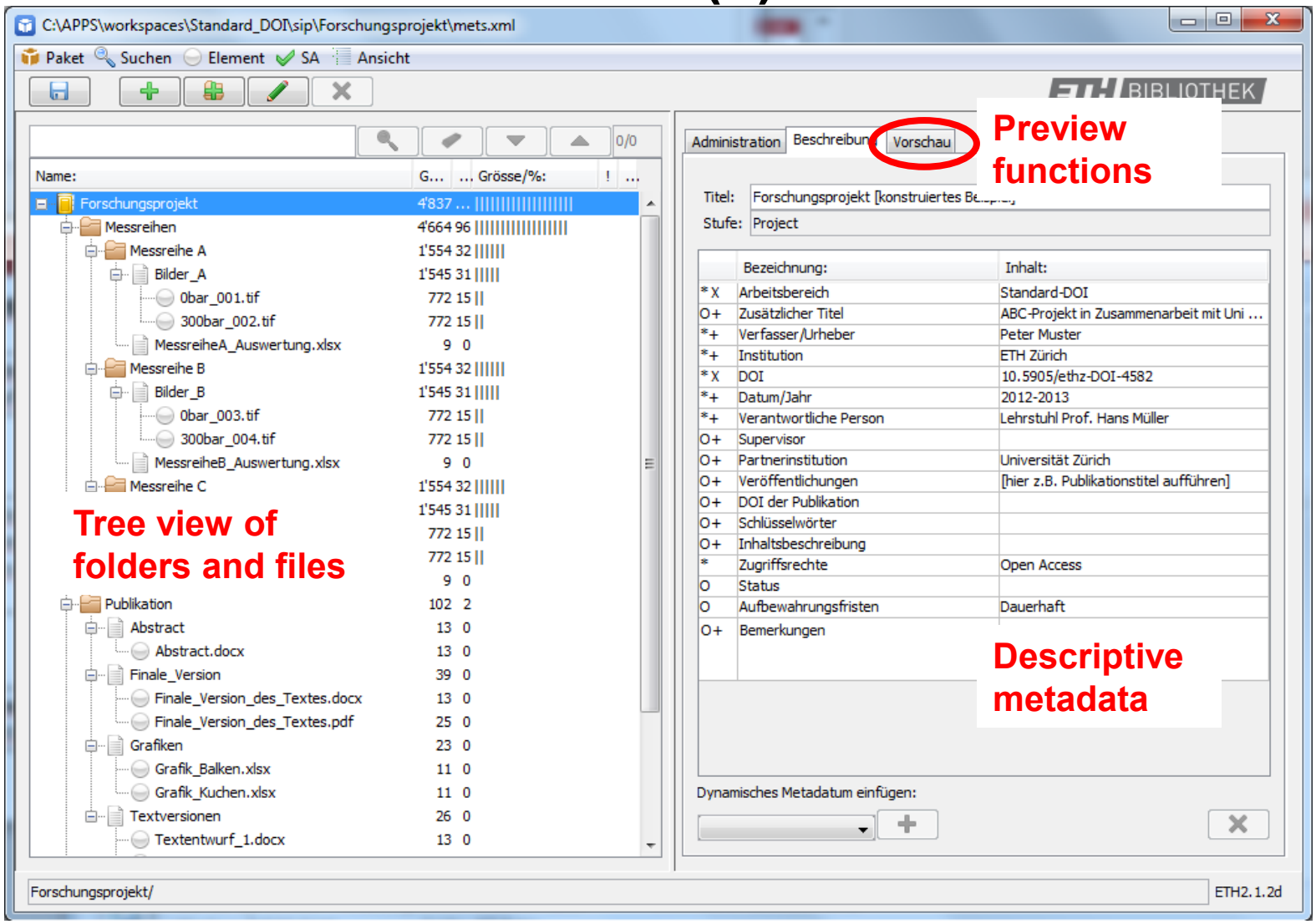
Administrative staff within ETH

- **Delivers structured data to ETH Zurichs university archives**…
- …**archives' staff appraises and selects** content and adds metadata

The GUI and its elements (1)



The GUI and its elements (2)

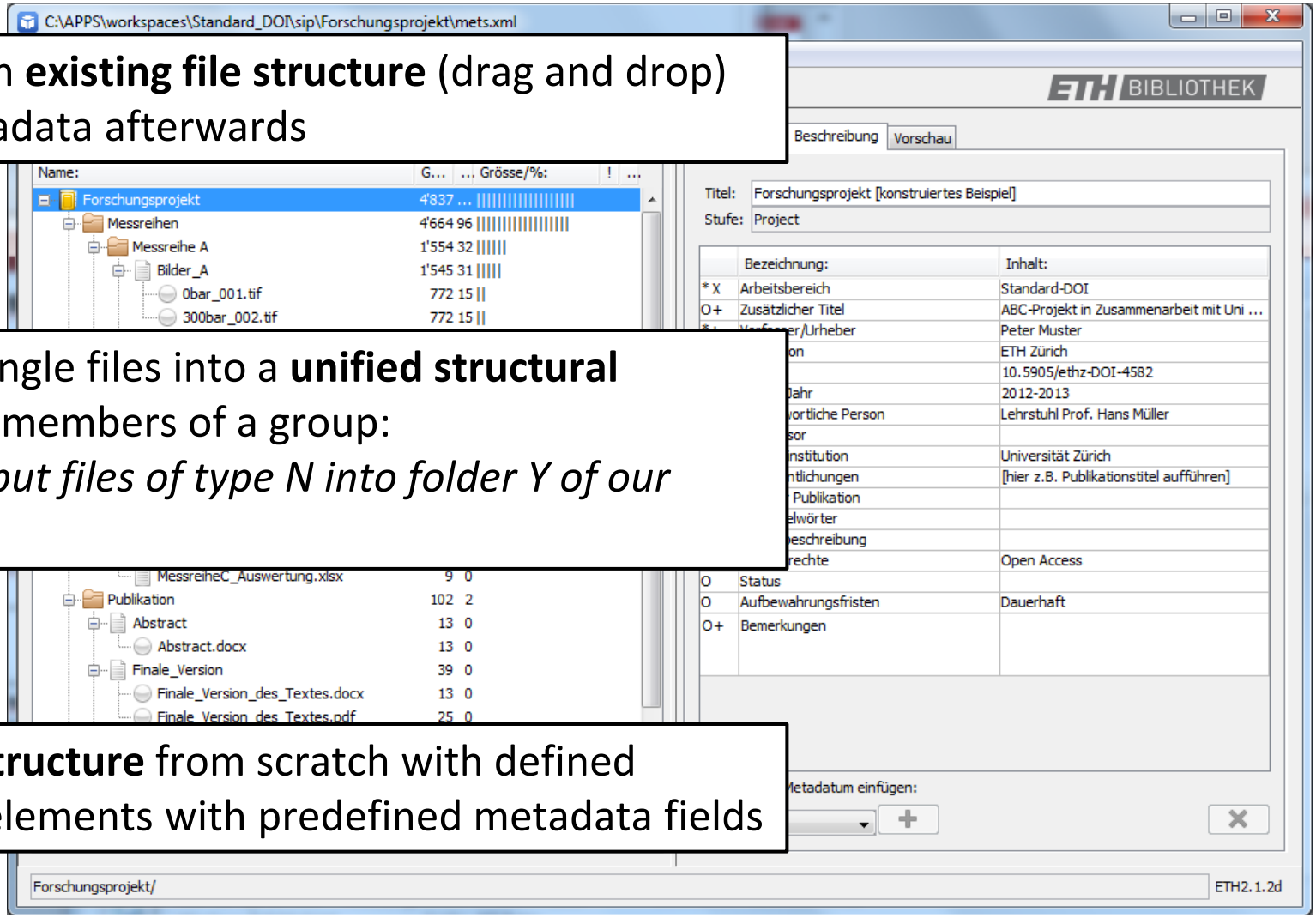


Practical use

1. Import an **existing file structure** (drag and drop) and add metadata afterwards

2. Import single files into a **unified structural template** for members of a group:
«We always put files of type N into folder Y of our structure»

3. **Build a structure** from scratch with defined hierarchical elements with predefined metadata fields



Why the effort?

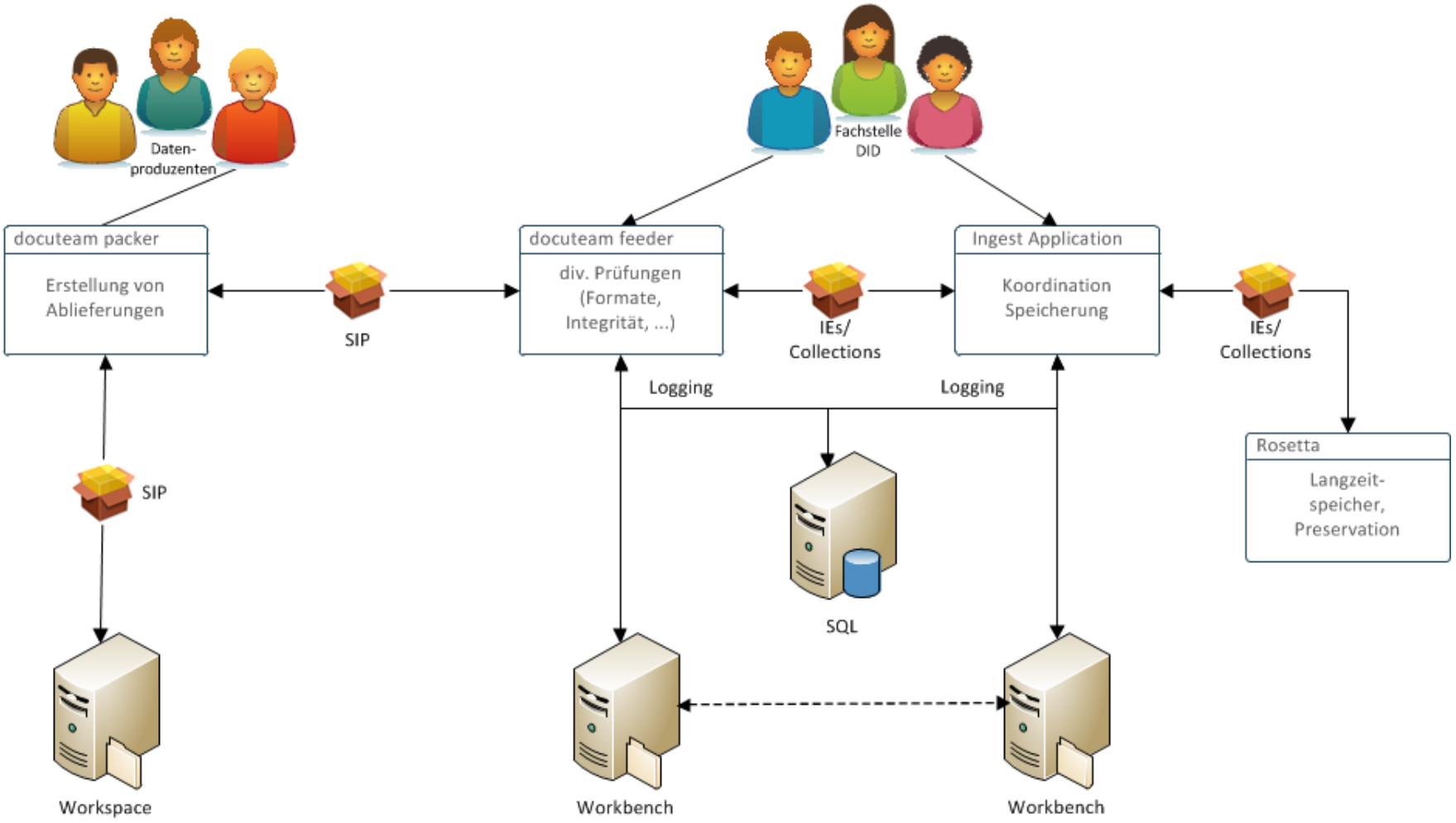
- «Local data management light»:
  Data are **structured and described** locally within the group
- **Group retains full control, but important work is already done** to facilitate long term preservation
- **Metadata can be configured** – within reasonable limits
- **Structure and metadata in METS-XML** can be submitted to ETH Data Archive automatically (via *docuteam feeder* as Submission Application)
- DOI are generated and can be used in citations (registration follows later in ETH Data Archive)
- **Selection of retention periods and access rights** to be enforced in ETH Data Archive

Issues to observe

- **Configuration** is flexible, but must remain consistent with MD schema
- **If flexibility** of configuration **is exploited**, effort for maintenance strongly increases and **the approach will not scale well**
- **Early discussion with the Digital Curation Office** is important!
- No installation, but it must be possible to **run *docuteam packer* locally**
- **Users can get themselves into trouble** by manipulations on the file system
- **If data remains on local storage for years**, problems with respect to long term preservation can occur once data is submitted to long term archive

Complete process into the archive

Gesamtprozess



Questions?

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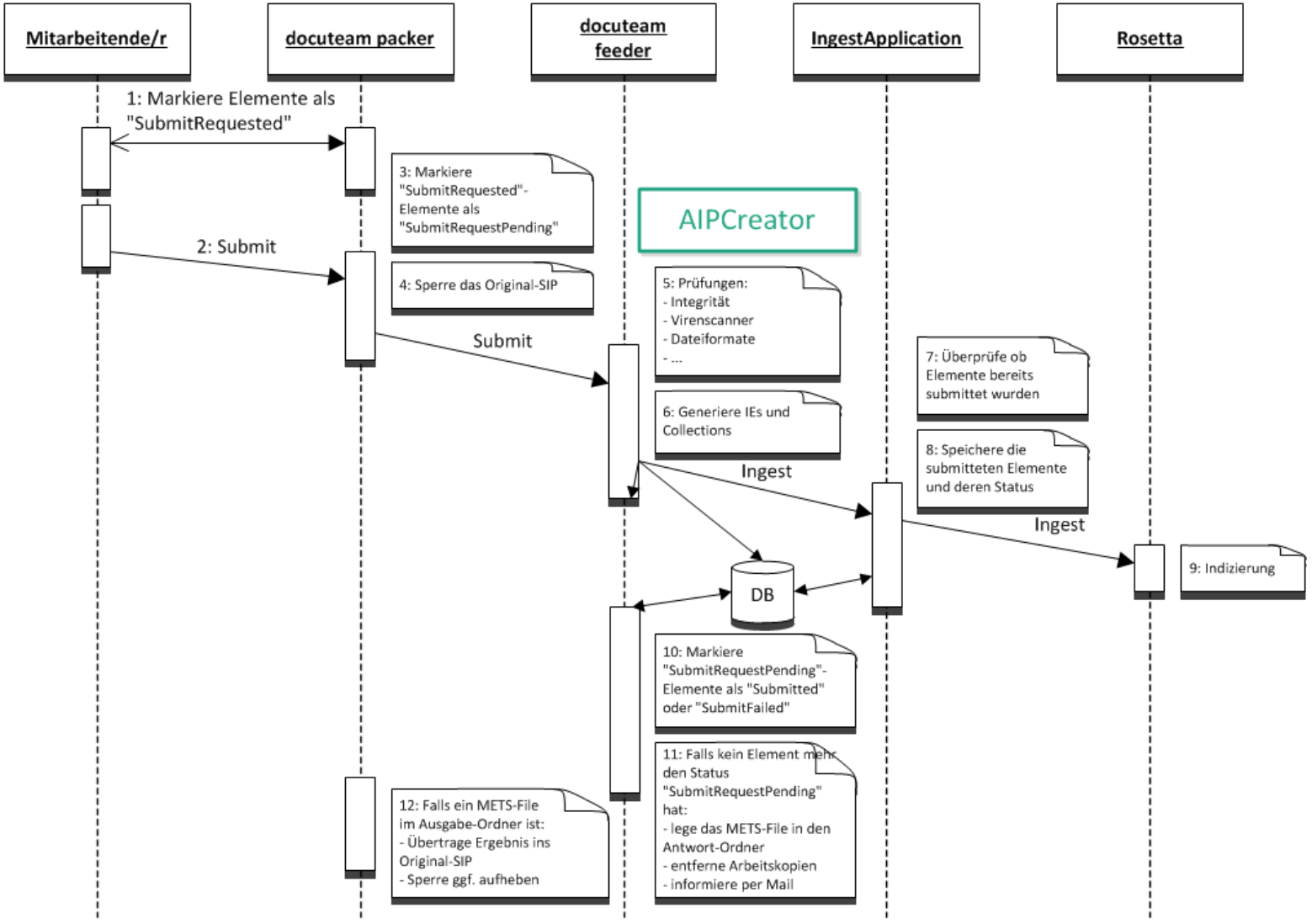
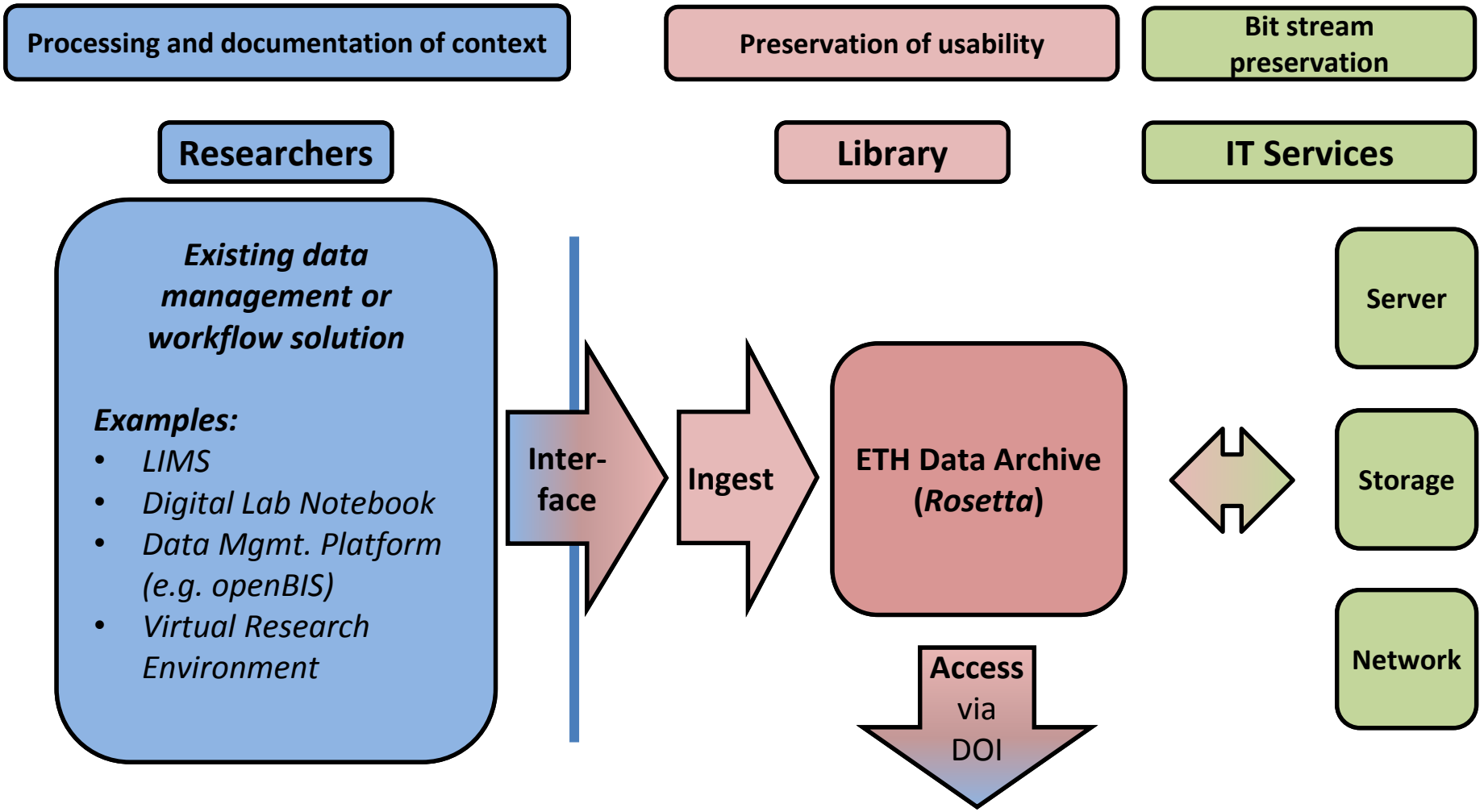
Use Case Research Data – «Small Data»

- **Distinct from «Big Data»**
- **Structured data in discrete files**; produced everywhere – even in projects which actually deal with «Big Data» as their research topic
- **Interface between data management ←→ Long term preservation**
- **Facilitate** compliance with accountability and **verifiability**
- **Ensure citability** of data → DOI-registration
- Support producer's own **re-use**, access by colleagues or *Open Data*
  → From ***Restricted Access* to *Open Access***
- **Retention period at least 10 years**

➢ *We expect increasing **requirements** by funders and universities **for data management***

Submission Process



(Close to) ideal approach for Research Data