YODA TOOLKIT CONTENTS
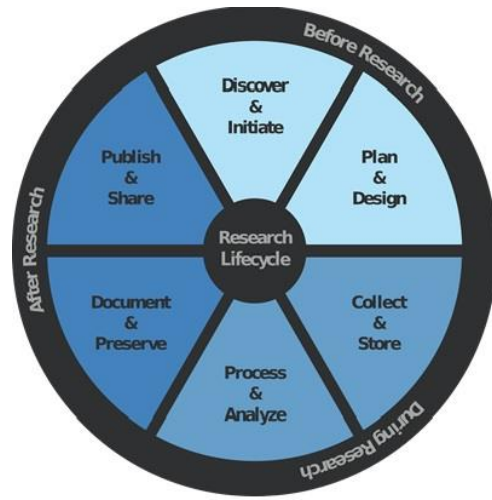
i. What is Yoda?

ii. Why this toolkit?

iii. Checklist for a successful implementation

iv. Examples

WHAT IS YODA?

Yoda as a software application
Yoda is a SURF hosting service that supports research data management during all phases of a research project. It provides a single solution for storing, sharing, archiving and publishing of research data sets

FAIR Yoda
Yoda facilitates working according to FAIR-principles in research and enables Open Science
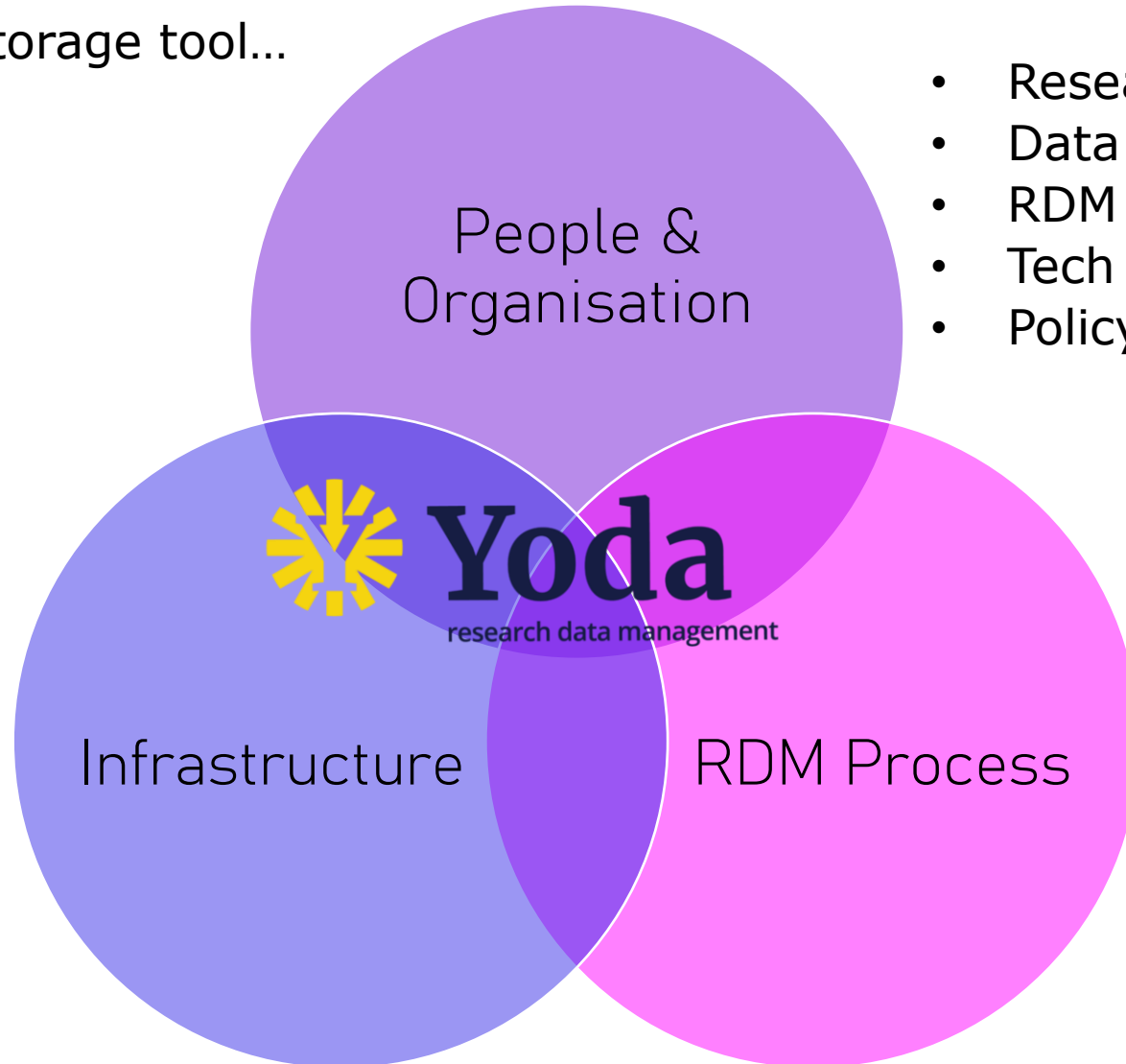
Yoda as a service for researchers
Part of Yoda is a check on the meta data before you archive or publish a data set. A research data steward will help you define high quality meta data to optimize findability of your data set

WHY YODA?

Not just another storage tool...

- Researchers
- Data stewards
- RDM support
- Tech support
- Policy

People & Organisation

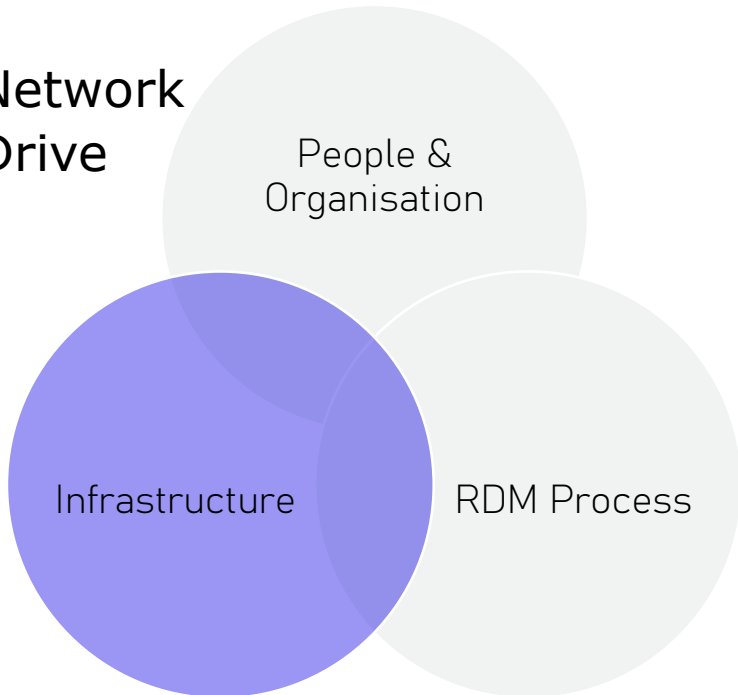- Storage
- Data sharing
- Security

Infrastructure

RDM Process

- Creation
- Metadata
- Archiving
- Publication

Yoda
research data management

WAGENINGEN
UNIVERSITY & RESEARCH

COMPARED TO OTHER SOLUTIONS

Sharepoint
MS Teams
Onedrive

People & Organisation

Infrastructure

RDM Process

Network Drive

People & Organisation

Infrastructure

RDM Process

PURE
DANS
4TU

People & Organisation

Infrastructure

RDM Process

WAGENINGEN
UNIVERSITY & RESEARCH
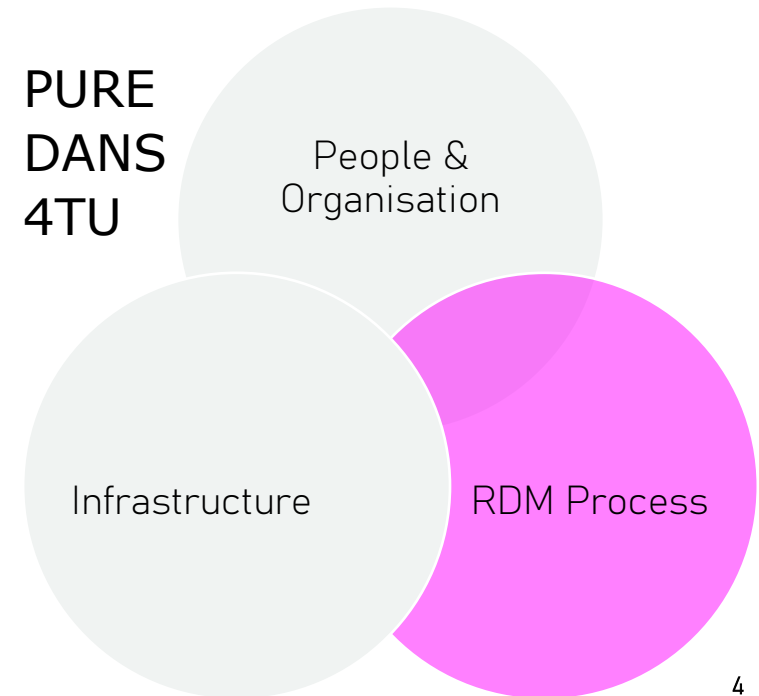
WHY A TOOLKIT?

The Yoda consortium was established early 2023. Its purpose is to safeguard the development of Yoda as a national RDM-platform and to exchange knowledge among partners

This toolkit* is meant for higher education institutions and academic hospitals who would like to join the Yoda consortium, by learning about the implementation of Yoda

This toolkit was developed during the SURF-DCC project 'Yoda Uptake' in 2023 by Vrije Universiteit Amsterdam and Wageningen University & Research
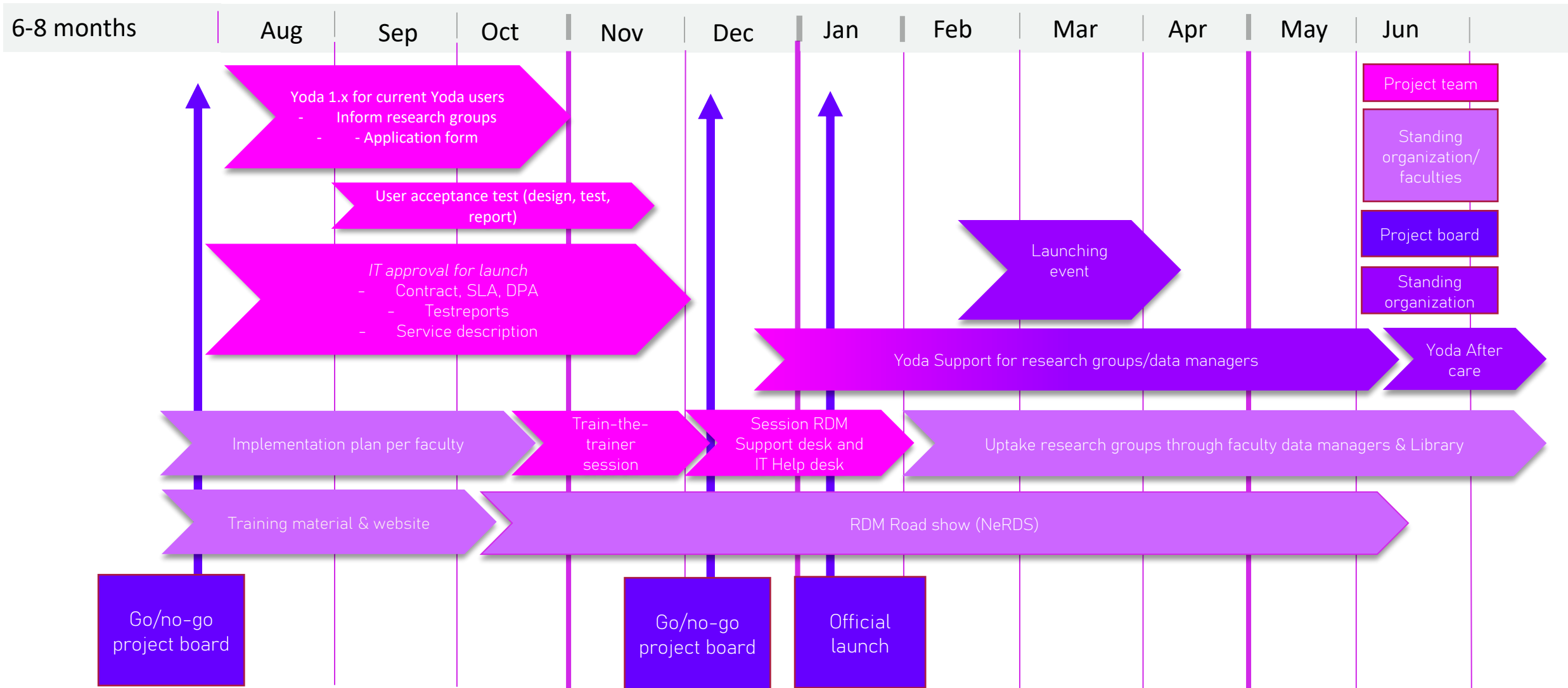
WHAT IS IN THIS TOOLKIT?

❑ Checklist for a successful Yoda implementation

❑ Examples:

    ❑ Project planning

    ❑ Project governance

    ❑ RDM Tools overview

    ❑ Organizing support

    ❑ Deliverables for Management

    ❑ Communication: core message & tools

    ❑ Cost model

    ❑ Stakeholder analysis

CHECKLIST FOR A SUCCESSFUL YODA IMPLEMENTATION

- ❑ Management commitment
- ❑ Technical know-how iRods & Yoda
- ❑ Change management
- ❑ Pilots with researchers
- ❑ Clear positioning in the IT-landscape
- ❑ Support staff as a first and second point of contact
- ❑ Structural funding for license, storage and application management
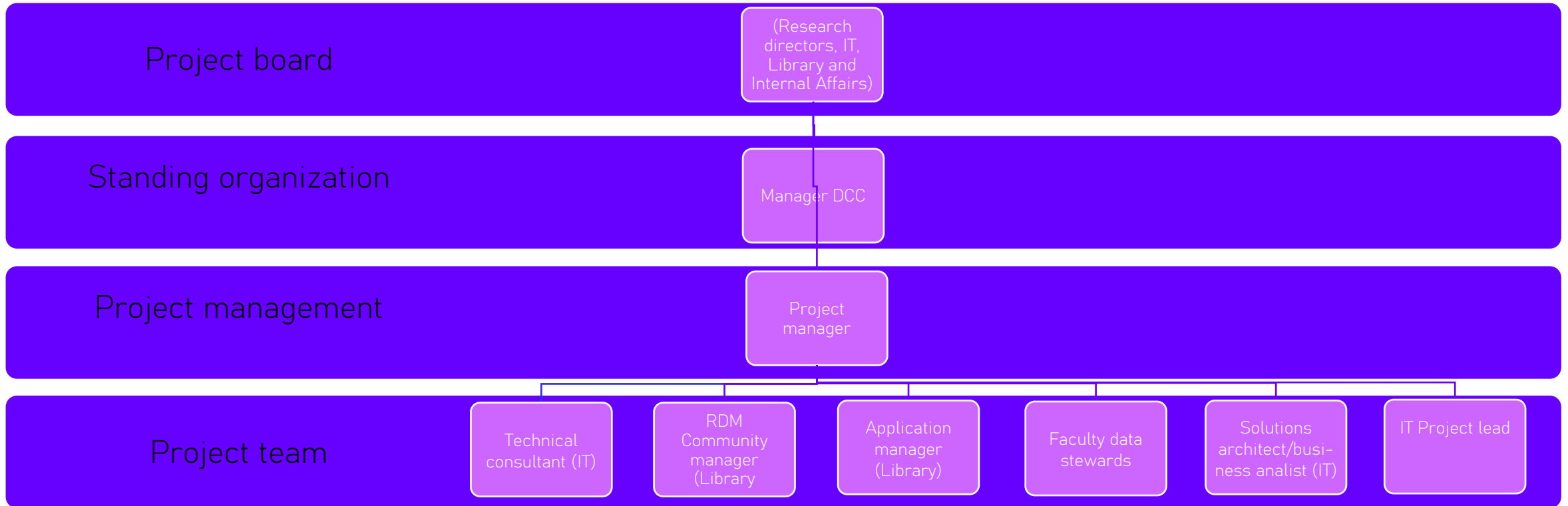- ❑ Active RDM community

EXAMPLE:
YODA PROJECT PLANNING

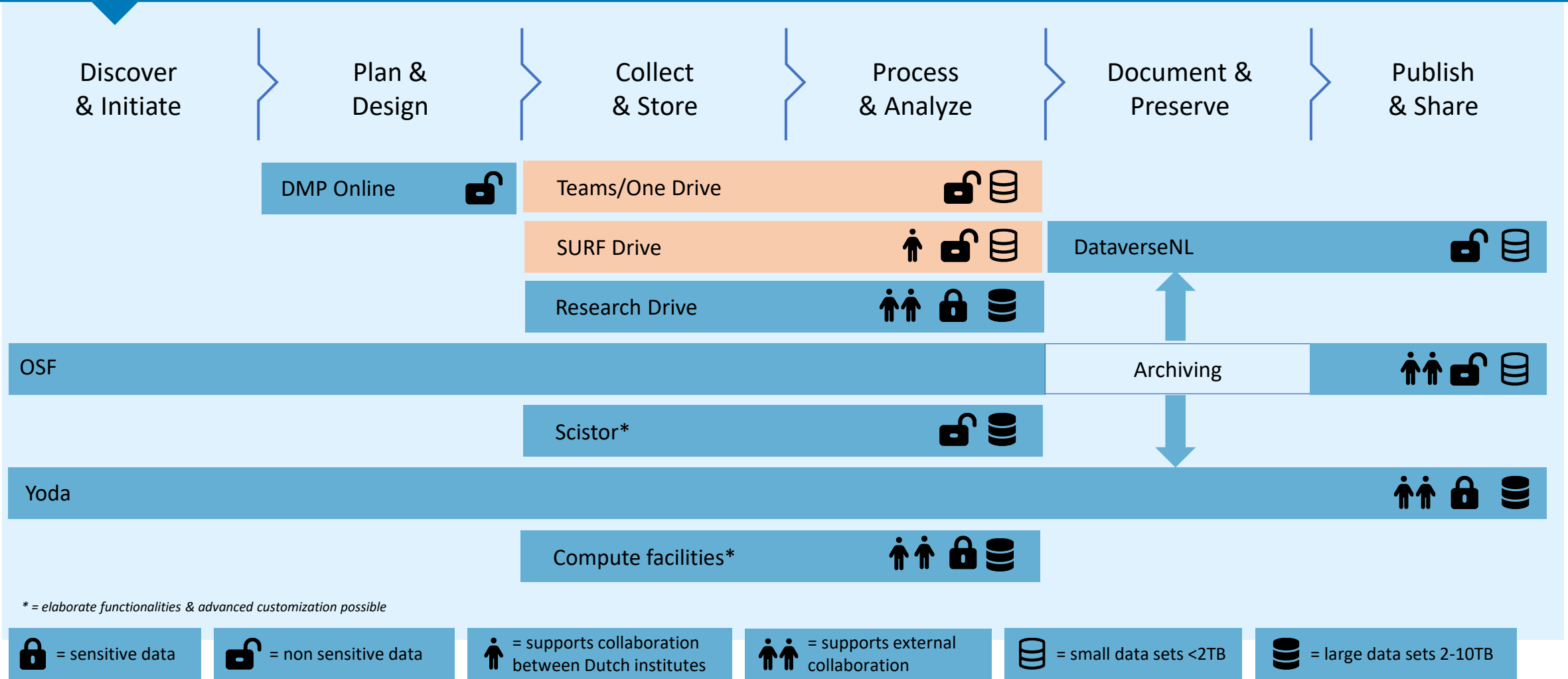| Point of contact	Role	Task	Remarks
First line	Faculty research data steward	• Intake together with application manager • Answer general questions from researchers • Check on meta data before archiving & publishing	Joint intakes for RDM is a new process for most researchers and more general questions on storage and security will arise.
First line	For large research groups/projects: dedicated data manager	• Answer general questions from researchers • Check on meta data before archiving & publishing	
Second line	RDM Support Desk (Library)	• Answer general questions from researchers	Library meta data specialist trains data stewards and data managers in checking meta data
Third line	Technical consultant (IT), application manager (Library)	• Answer advanced questions from faculty data stewards and data managers	Product owner is responsible for supplier management (SLA) contracts, funding, resourcing and monitoring progress on major Yoda developments. Application manager is (delegated) product owner and organizes key user meetings, does intakes/account management, gathers feature requests, communicates on new features, downtime etc., provides input to product owner on supplier's adherence to SLA etc. Optional: technical consultant answers more technical questions from application manager on for example storage facilities, customized iRods set-ups, complex issues/feature requests etc. Possibly takes part in SURFs Yoda expert group.
Fourth line	SURF/UU	• Answer advanced questions from application manager and technical consultant	UU is responsible for the development of Yoda SURF offers Yoda as a secure service including Object Store (active storage), Data archive (tape storage) and SURFConext or SRAM for authentication

EXAMPLE:
ORGANIZING YODA SUPPORT

Project board — (Research directors, IT, Library and Internal Affairs)

Standing organization — Manager DCC

Project management — Project manager

Project team — Technical consultant (IT) | RDM Community manager (Library | Application manager (Library) | Faculty data stewards | Solutions architect/business analist (IT) | IT Project lead

EXAMPLE:
YODA PROJECT GOVERNANCE
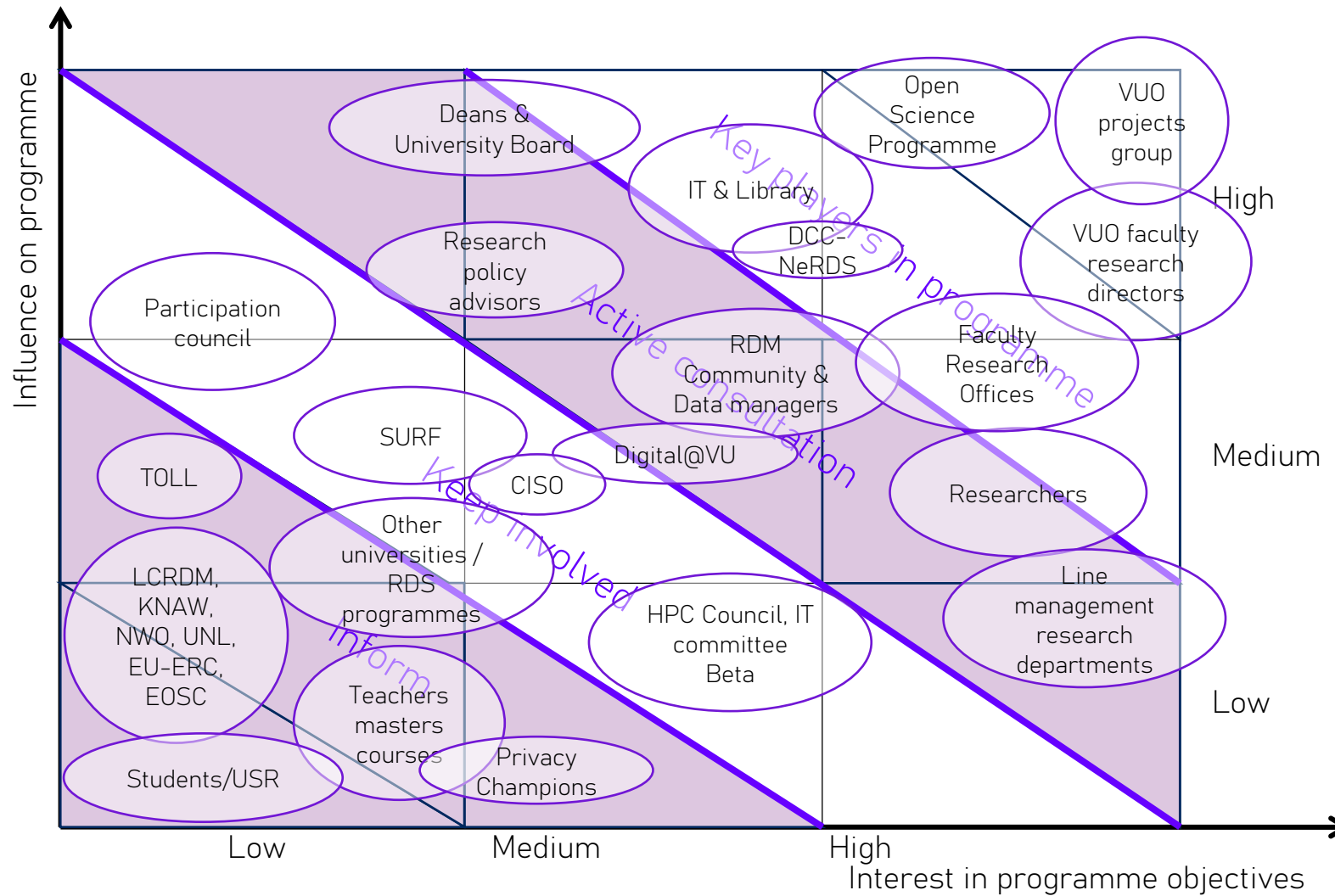
EXAMPLE: STAKEHOLDER ANALYSIS

EXAMPLE: COST MODEL

Main principles IT-services for researchers:

❑ Services that facilitate Open science & FAIR principles
❑ Services that are actually adopted by researchers: affordable, flexible, user friendly and with limited administrative burden

Cost model characteristics:

❑ One cost model for all storage and archiving solutions for research data per institution
❑ Basic service paid by faculties/university funding to foster regular use
❑ Acceptable tariffs for large users
❑ Tariff dependent on RDM functionalities on top of basic data storage: higher than raw storage, but not too high to prevent users being pushed towards non-managed solutions (RDM functionalities: security, collaboration and support for FAIR)

COMMUNICATION: IMPORTANT ASPECTS FOR RESEARCHERS

- ❑ Checklist for a successful Yoda implementation
- ❑ Positioning Yoda as a solution for archiving of research data sets as required by RDM-policy
- ❑ Positioning as an integrated RDM-solution for all stages in the research life cycle
- ❑ Enabling working according to FAIR principles, e.g. by using meta-data and options for sharing of data sets
- ❑ Contributing to research impact by offering DOIs which facilitates citation of research data sets
- ❑ Suitable for sensitive data (but not for secret data)
- ❑ Tariffs that match research budgets

IMPORTANT DELIVERABLES FOR MANAGEMENT

- Comparison between RDM-solutions based on requirements and researchers' use cases
- Successful pilots with selected research groups
- Board decision based on pilot evaluation to choose Yoda as an RDM-solution
- Project presentations to faculty research data stewards to prepare them for their Yoda tasks
- Acceptance testing with selection research groups (connections and working process)
- Formal launching event
- Pro-active RDM communication and community activities

EXAMPLES: VU COMMUNICATION TOOLS

- ❑ <u>Yoda Explanimation</u>
  Yoda: what why and how
- ❑ Presentation: VU Launching event

  Microsoft
  werPoint Presentati

- ❑ <u>VU Yoda portal</u>

More resources by the Yoda consortium on a dedicated SURF Drive for partners

Toolkit
for a successful
Yoda implementation

YODA UPTAKE PARTNERS SURF-DCC 2023

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