Scholars Portal Dataverse Walkthrough

Creating an Account

1. Go to: https://dataverse.scholarsportal.info/

2. Click on “Sign Up” to create an account.

3. Fill in the requested account information. Under “Affiliation”, ensure that “University of Victoria is selected.

4. You must read and accept Scholars Portal’s Terms of Use in order to create an account.
5. Click “Create Account”

6. Remember to check the e-mail address you supplied for an account verification e-mail.

**Adding a Dataset**

7. Log-in to your Dataverse account.

8. You will be redirected to your institutional Dataverse (in this case, UVic). In case you are not redirected here, you can search for “University of Victoria” in the above search box that is displayed on every page.
9. Click on your username in the top-right corner. On the drop-down menu that appears, click “My Data”.

10. The “My Data” page is where all the Dataverses you have permissions to deposit data to will be displayed. Any datasets you create in the future will also be listed here.

11. By default, all UVic researchers are able to deposit datasets to “UVic Research Data Collection”.

12. Next to the Dataverse title, you should see a blue pill box with your user status. Typically, UVic researchers should see the “Dataset Creator” role displayed. With this status, you have permissions necessary to create datasets, edit metadata, upload files, and submit datasets for publication.

13. Click on “UVic Research Data Collection” to access the collection.
14. Within the “UVic Research Data Collection” Dataverse, click the “+ Add Data” button. From the drop-down list that appears, click “New Dataset”.
**Depositing Data**

15. You should now be on the main data input screen. This is where you will add metadata to describe your dataset, upload your files, and set the terms of use.

16. Begin by selecting a Creative Commons License to apply to your dataset, under the “Dataset Template” dropdown menu. (Please Note: You will be able to add more detail in the “Terms of Use” section later on.)

Template license options include:

- CC 0 (public domain)
- CC BY (attribution required for reuse)
- CC BY-NC (attribution required for reuse and only for non-commercial purposes)
- CC BY-SA (attribution required for reuse and output must be shared with the same license)
- CC BY-NC-SA (attribution required for reuse, only for non-commercial purposes, and output must be shared with the same license)

For more information about Creative Commons licenses, contact the [UVic Libraries Copyright Office](https://www.library.ubc.ca/services/copyright).  

17. Next, start completing the required citation metadata fields. These include Title, Author, Contact, Description, and Subject. You can mouse over the field names (in blue) to get more detail about the expected information for that field.

18. If you need to add multiple authors or contacts, click the + icon to add more fields, as necessary.
19. Under the “Files” heading is where you will upload your data. Click “+ Select Files to Add” to open a file explorer window to navigate to the files you wish to upload. Alternatively, you can drag and drop files into the area indicated.

20. Once your files are successfully uploaded, you can modify their file names and add a custom text description. You can also add tags to categorize your files. Click “Edit Tags” and select from “Data”, “Code”, “Documentation”, or create a custom tag to let users know more about the files in your dataset.

21. Once you are finished uploading and describing your files, click “Save Dataset”.

**Adding Metadata**
22. After saving your dataset, you will get a preview of what the published dataset will look like in Dataverse.

23. At this point, we need to add some more metadata to describe our files to make them discoverable. Click the “Metadata” tab and then click “Add + Edit Metadata”.

24. On the Metadata tab that appears, you will be able to use a range of fields to describe your data. Complete those that are most relevant for others to be able to discover and understand your dataset.

For example, if your dataset is accompanying a published article, add the citation information for that article to the “Related Publication” field.

In addition to citation metadata, you can also add subject-specific metadata under the tabs listed further below, including Geospatial, Social Sciences and Humanities, Astronomy and Astrophysics, and Life Sciences categories.
25. Remember to click “Save Changes” when complete.

**Setting Terms of Use**

26. Back on the dataset preview page, click the “Terms” tab to set any terms and restrictions for accessing and reusing your dataset.

27. If you require support completing these fields, contact the Data Curation Librarian (Shahira Khair, skhair@uvic.ca) for assistance.

28. When exiting, remember to click “Save Changes”
Submitting a dataset for publication

29. Back on the dataset preview page, when you are ready to submit your dataset for publication by the UVic Dataverse administrator, click the “Submit for Review” button.

*Note that you will not be able to make any changes to the dataset while it is in review.*

30. The Dataverse administrator will review your dataset. If any changes are required, they will contact you and return the dataset to your control for necessary modifications. Otherwise, they will push your dataset to publication and notify you once this action has been completed.