McMaster Dataverse Deposit Walkthrough

Creating an Account

1. Go to: https://borealisdata.ca/dataverse/mcmaster
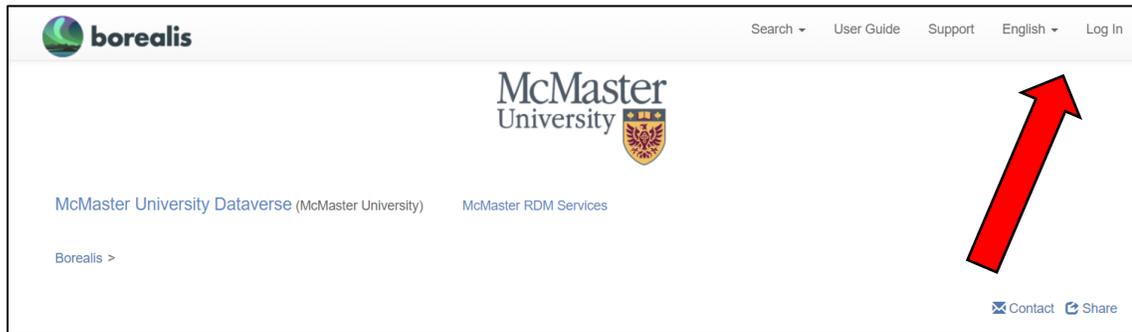
2. On the Log In screen, select McMaster University from the institutional drop-down menu and click Continue.
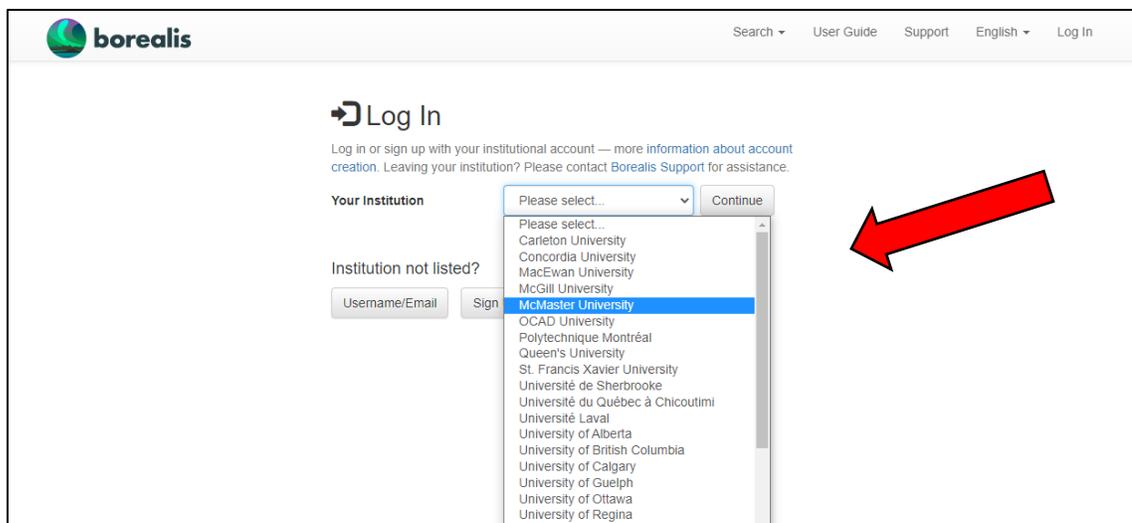
3. Enter your MacID to log in to the Borealis Dataverse system.

Adding a Dataset

4. Log-in to your Dataverse account.

5. **Navigate to the main McMaster Dataverse page**, and click the 'Add Data' button. From the drop-down list that appears, click "New Dataset".
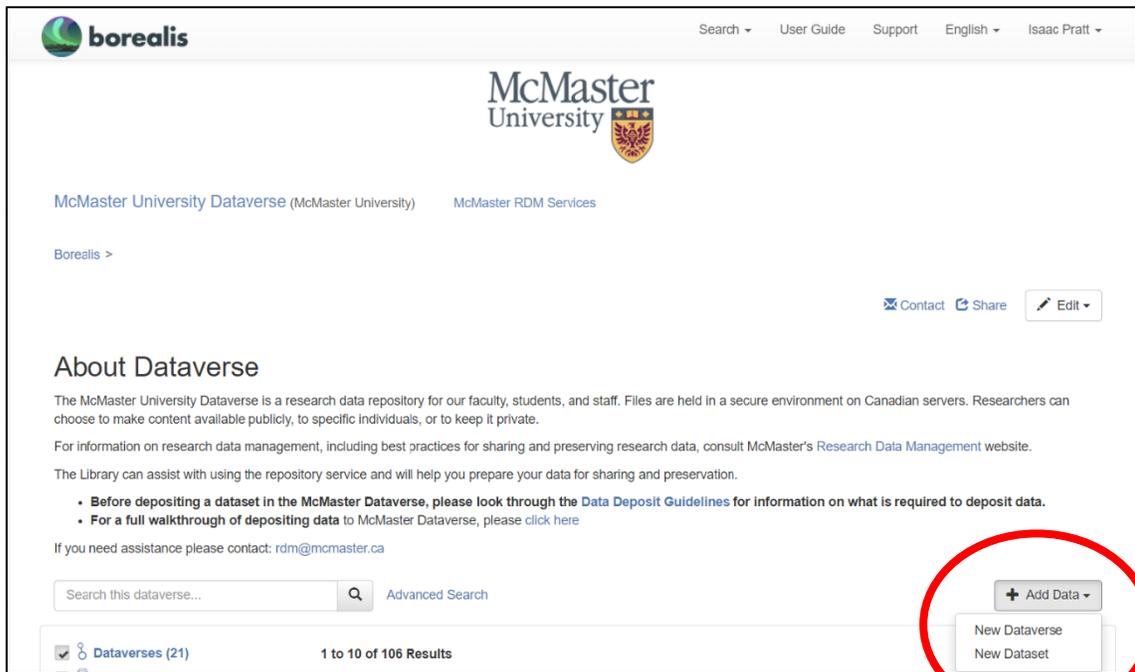
Adding a data license and dataset citation metadata

6. You should now be on the main dataset description page. This is where you will add metadata to describe your dataset, upload your files, and set the terms of use.

7. Begin by selecting a 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.)
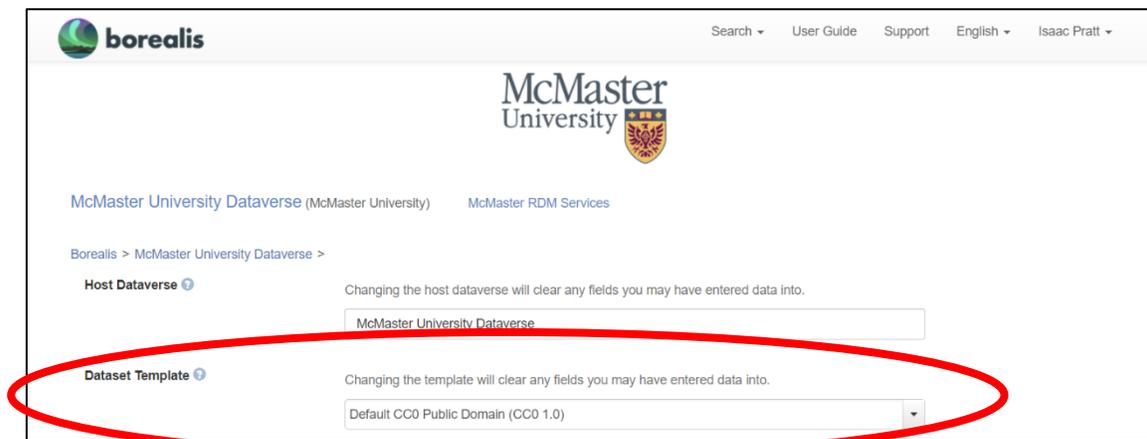

- **CC 0** (public domain)
- **CC BY** (attribution required for reuse)
- **CC BY-NC** (attribution required for reuse and only for non-commercial purposes)
- **CC BY-SA** (attribution required for reuse and output must be shared with the same license)
- **CC BY-NC-SA** (attribution required for reuse,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

For more information about licenses, take a look at the McMaster RDM page on [Publishing data](#).

8. Next, start completing the required citation metadata fields. These include Title, Author, Contact, Description, and Subject. You can also add keywords and specify the vocabulary you are using (if applicable). You can mouse over the field names (in blue) to get more detail about the expected information for that field.

9. If you need to add multiple authors or contacts, click the + icon to add more fields, as necessary.

Uploading data files

10. 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.
    - **Important Note**: Compressed files in .zip format are unpacked automatically. If you have a lot of files, you can compress the whole directory you wish to upload in a .zip file and upload the compressed file. Dataverse will maintain the file/folder structure.
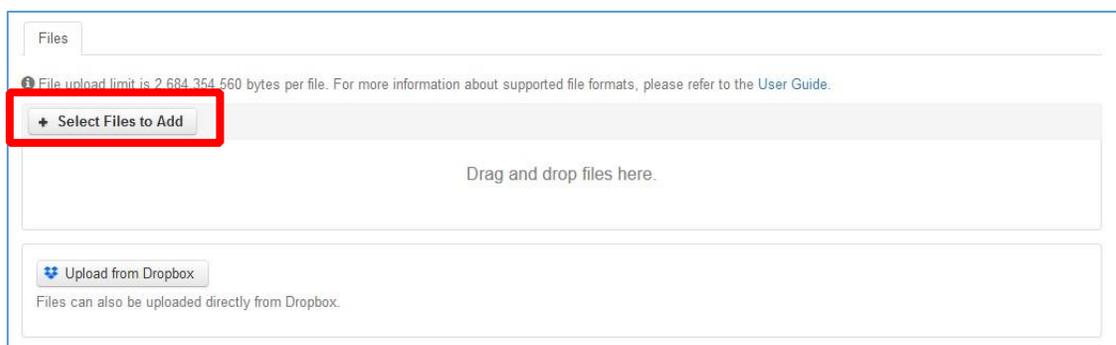

11. Once your files are successfully uploaded, you can modify their file names and add a custom text description. You can also add tags to categorize your files. Click "Edit Tags" and select from "Data", "Code", "Documentation", or create a custom tag to let users know more about the files in your dataset.
    - We recommend uploading spreadsheet/tabular data in the **.csv format**. If you are uploading spreadsheet data in .xlsx format, you may get an error message saying the "ingest process has finished with errors". Don't worry, your files have still uploaded properly. This error only refers to Dataverse's tabular data exploration feature which does not fully support Microsoft Excel file formats.
12. Once your files have been uploaded, you can click on the 'Restrict' button to limit access to data files. For example, if you have chosen not to make your data open access, you can restrict access to the data files while allowing open access to metadata.
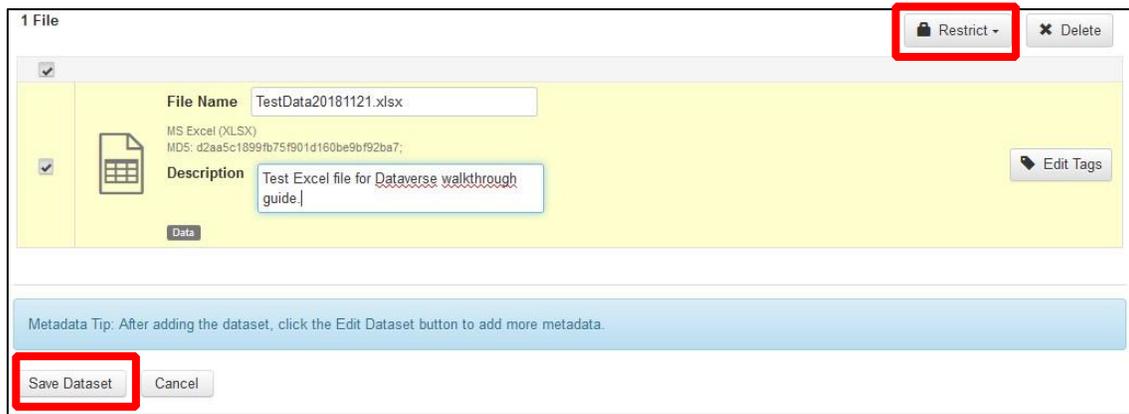
- Once you are finished uploading and describing your files, click "Save Dataset". At this point the dataset is not yet published and is only visible to you and the Dataverse administrators. It will be marked as a Draft and Unpublished dataset.

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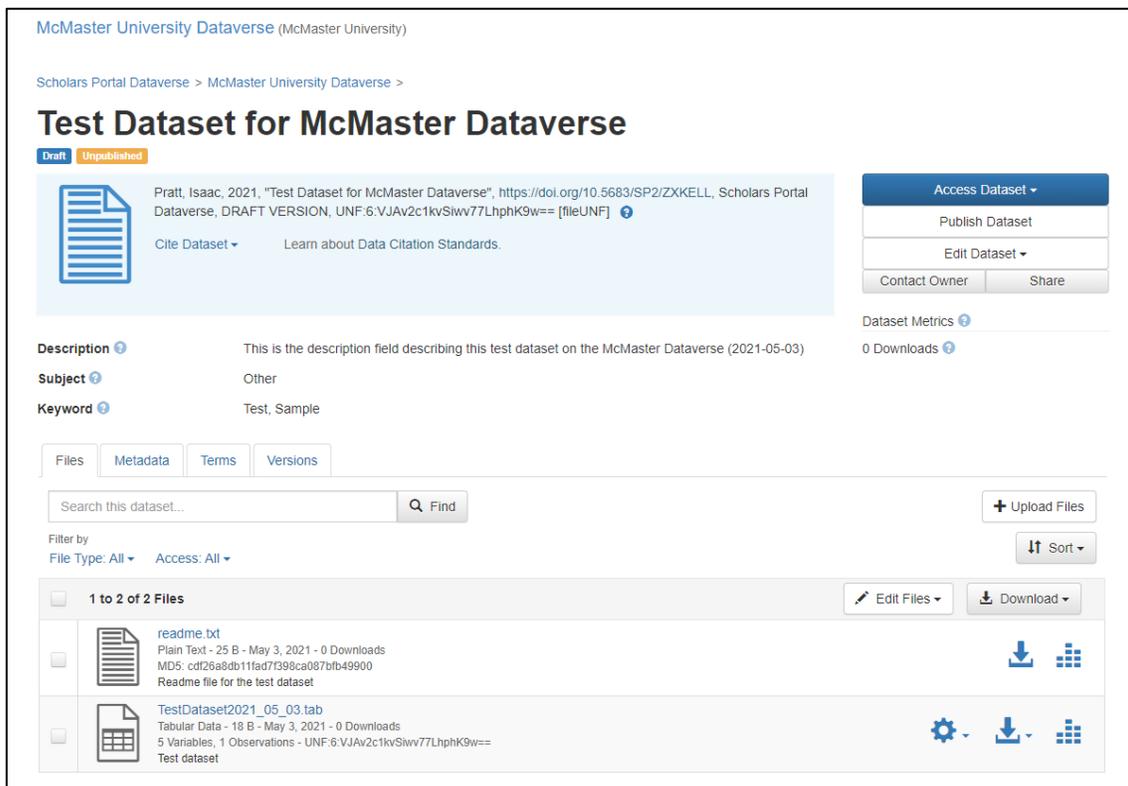
Adding more Metadata

14. At this point, you can add more metadata to make your dataset more discoverable. Click the "Metadata" tab and then click "Add + Edit Metadata". Dataverse offers a broad range of metadata fields, but we only require you to complete a few of them: Title, Author and Contact information, Description, Subject, and the Related Publication fields.

15. To fill out the Related Publication field: enter the citation information for the publication associated with the Dataset. We require you to include at minimum the title, authors, and DOI for the publication. To enter the DOI under 'ID Type' choose DOI and enter the DOI into the 'DOI Number' field. You can additionally enter the full DOI link into the URL field. You can click on the "+" button to add information for multiple publications if required. If your dataset is not associated with a publication, you can skip this step. Remember to click 'Save Changes' to save the information entered.

16. 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.

Setting Terms of Use

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

18. If you require support completing these fields, contact the Research Data Management team at rdm@mcmaster.ca

19. When exiting, remember to click "Save Changes"

Submitting a dataset for publication

22. Back on the dataset preview page, when you are ready to submit your dataset for publication click the "Submit for Review" button.

- You will not be able to make any changes to the dataset while it is in review.

23. 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.