Quick Guide, June 2022

Depositing Data in CU Dataverse Collection @ Borealis

Carleton's research data can be hosted in the Borealis, Canadian Dataverse Repository, a publicly accessible secure Canadian data system.

1. Create Account

Go to Borealis, the Canadian Dataverse Repository > Explore Borealis > Log In (at top right)

Click 'Sign Up'. Fill in the required fields and use your @Carleton.ca email. You can edit your account details after logging in.

Once you're set up, proceed to the CU Dataverse Collection to create a new Dataverse or Dataset!

2. Add & Edit Data

Login

You will be redirected to the CU Dataverse Collection.

Select the Dataverse

You can find Dataverse Collections via:
- My Data (in the dropdown menu from your account name in the upper right),
- 'Dataverses' link in the left column the page,
- The side-scrolling banner
- 'Search this Dataverse' search bar

Create a new dataset

Click '+Add Data', and choose New Dataset (not New Dataverse) from the dropdown menu.
- Select a dataset Template for the desired Creative Commons license (default license is CC0)

- *Be aware: selecting a template will clear all other data fields, so do this first.*

Fill in **Required Metadata** fields marked with a ***** (Title, Author, Contact, Description, Subject).
- If desired, fill in additional metadata fields. **RECOMMENDED:** Keywords, Related Publications.
- *Note: many more metadata fields become available for editing after your dataset is saved.*

You can save the dataset without adding any files.

Upload data files

The **Files** section is at bottom of the page, below the Citation Metadata.
- Drag and drop files from your desktop, or +Select Files To Add, or Upload from Dropbox.
- Max file size: 2.5Gb. If your files are too large, try putting them into a Zip file, or contact dataservices@carleton.ca for help.
- Be sure to add supplementary documentation such as a data dictionary, codebook or ReadMe file.
- Describe the files: Title, Description, Tags. People can't use your data if they don't know what it is!

Save Changes

Click 'the Save Changes' button. This saves the Dataset in **Draft** form; it is **not yet published** nor publicly visible.
- Once a dataset is published, Borealis assigns a **DOI** to permanently identify it. You can also assign a **Private URL** to share with a journal without publishing the data.
- Contact dataservices@carleton.ca for help.

Edit your dataset

You can edit elements of your Dataset at any time using the **Files, Metadata,** and **Terms** (license and use permissions) tabs at the bottom of the page.

Files can be Restricted so they are available only on request. Contact dataservices@carleton.ca or review our help guides to learn how.

3. Publish Dataset

Depending on your user permissions, you will have a button for either:
- Submit for Review (the draft Dataset is reviewed by a the Data Services Team.
- Publish (makes Dataset publicly available)

Changes made to Files, Metadata, or Terms **after publishing** your dataset will be saved as a Draft version. **Click Publish again** to make the changes go live; the new version will supersede the old.

Admin assistance is needed to un-publish a Dataset, so be sure before Submitting/Publishing

4. Cite Dataset

The data citation is generated by Borealis based on the required metadata you entered. It's displayed in a blue box below the dataset title and version #.

Copy and paste, or use the **Cite Dataset** button to export the citation into EndNote, RIS, or Bibtex.

Questions? Contact dataservices@carleton.ca