Important Things to Note:

- You are responsible for any data you upload, including the publication and deletion of your data.
- Faculty and researchers should speak with their liaison librarian to begin working with Dataverse.
- Users must accept the University of Manitoba Dataverse General Terms of Use before using the system. The Terms of Use are available at http://libguides.lib.umanitoba.ca/dataverse-tou.
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Introduction

Glossary

**Dataverse**: The term "Dataverse" can be used to refer to both:
- the name of the digital repository platform (dataverse.org), and
- a structure within that platform that contains datasets and other dataverses.

**Dataset**: A container for research data, code, metadata, and documentation.

**Role**: A user category within Dataverse. Different roles come with different sets of permissions.

**Permission**: The ability to take an action within Dataverse. Publishing dataverses, creating datasets, and viewing unpublished dataverses are all examples of permissions.

**Theme**: The visual design of an individual dataverse. This includes logos, page colours, taglines, and links to external websites.

**Widget**: A box that can be embedded into a website that provides a link to a researcher’s dataverse. Widgets offered by Dataverse include a Dataverse Search Box or a Dataverse Listing.

**Dataset Template**: Dataset templates can be set up if you plan to publish many datasets that hold similar information or have a similar format. These templates can have prepopulated metadata fields, provide instructions for those uploading datasets, or can have custom Terms of Use and Access statements.

**Dataset Guestbook**: An optional feature in Dataverse that requires users to fill in a short form before downloading a file. Guestbooks can collect account information such as username, first and last name, and affiliation, and can also collect responses to custom questions.
Structure of Dataverse

A researcher's personal dataverse can contain other dataverses and datasets.

A dataset is the container for data, documentation, code and metadata.
Creating an Account in Dataverse

To begin working with Dataverse, you will need to create an account.

1. Go to http://dataverse.lib.umanitoba.ca/
2. Click Sign Up

3. Fill in all required fields
   - Note that your UMNet ID and password should not be used as a username and password, as per the UM Access & Privacy Office

Once you have an account, you can be assigned a role in an existing dataverse, or have your own dataverse created by the system administrator. Contact your liaison librarian for more details about the next steps.
Basic Dataverse Orientation

If you are logged out, only published files will be visible on the University of Manitoba Dataverse landing page. Facets on the left side of the page allow you to narrow down the visible dataverses, datasets, and files.
Once you are logged in, any unpublished dataverses and datasets to which you have access will now be visible. In the example below, an unpublished dataset draft is now visible. Any restricted files to which you have access would also now be visible.

When searching within Dataverse, search results can include dataverses, datasets, and files. Files with restricted access will have a red lock before the file name, as seen in the screenshot below.
Clicking on a dataset will show a list of all files contained within that dataset. The example below is from the dataset “Space Experience Reports 2015”.

- Note the keywords included to make these files easier to find in a search (“Library buildings, Signs and signboards” in the example below)

**Space Experience Reports 2015**


<table>
<thead>
<tr>
<th>Description</th>
<th>This dataset contains the space experience reports conducted by the units of the University of Manitoba Libraries in 2015.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Other</td>
</tr>
<tr>
<td>Keyword</td>
<td>Library buildings, Signs and signboards</td>
</tr>
</tbody>
</table>

- Note that you can request access to restricted files, while others may be immediately available for download
- If the owner of the file has activated a guestbook, clicking on Download will bring up the guestbook that must be filled out before downloading the file.
The citation details and all other metadata applied to the dataset are visible by clicking on the Metadata tab at the top of the list of files.
Setting Up a Dataverse

Once you have your own dataverse created by the system administrator, you can create sub-dataverses to house the datasets for each of your projects.

1. Go to the homepage for your main dataverse
2. Click Add Data button

3. Click “New Dataverse”

4. Enter the name of the dataverse
5. Enter an identifier. This will become part of the URL for the new dataverse; you’ll want it to be fairly intuitive but not too general (see example in screenshot below).
6. Choose a category (generally Researcher or Research Project)
7. Metadata Fields: “University of Manitoba Dataverse metadata” is automatically selected, which includes all metadata schemes. To manually choose which metadata sets you would like to use, uncheck “Use metadata fields from University of Manitoba Dataverse”.

- Choose the metadata fields that would be most useful according to the discipline — e.g., researchers from the Faculty of Arts may be interested in adding data in the Social Science & Humanities Metadata fields. Your liaison librarian can advise you as to which fields will be most useful to include for your projects.
- Note that you can click on the View Fields link to see all metadata fields included in that set, and to select whether a field will be required or optional for this dataverse.

8. Add additional facets if necessary (see screenshot below). Facets appear on your dataverse landing page and allow others to easily narrow down searches for dataverses and datasets. Author Name, Subject, Keyword Term and Deposit Date are selected by default for all dataverses within the U of M Dataverse.

- To add more facets, uncheck “Use browse/search facets from University of Manitoba Dataverse”, select a metadata field from the box on the left, and use the arrow button to move it to the “Selected” box on the right.
Click Create Dataverse.

- Note that the settings of the parent dataverse (such as metadata schemes and facets) trickle down to the dataverses and datasets it contains.
- Note that nothing in the dataverse can be published unless the dataverse itself is published. The dataverse will begin as Unpublished (see blue circle in screenshot below). To publish a dataverse, click the Publish button circled in red below.
Creating a Dataset

Once you have a dataverse ready to use, you can add some data by creating a dataset.

1. Click Add Data

2. Click New Dataset

3. Complete all required fields: title of the dataset, name of the author, description, contact email, and subject.
   - Under the Author field, the Identifier Scheme field (see screenshot below) is where an ORCID or ISNI can be entered if you choose.
4. Add a Keyword Term and the vocabulary in which it is found.
   - Your liaison librarian can suggest the most relevant vocabulary to use for your discipline. Library of Congress Subject Headings is a good general choice, and can be searched for relevant terms online: [http://id.loc.gov/authorities/subjects.html](http://id.loc.gov/authorities/subjects.html)
   - Try to use a consistent and standardized vocabulary. Keywords will be helpful when searching for specific datasets within a dataverse.

5. Add files to the dataset by clicking “Select Files to Add”, or drag and drop files into the designated area.
   - If uploading zipped files, only include one zipped file per dataset. Dataverse unzips the folder when uploaded and rezips when downloaded, without keeping the files in their original zipped folders.

6. Click “Save Dataset”.

Once the dataset draft has been saved, you will be brought to the main page for that dataset.

   - Note that the dataset has been assigned a DOI (see blue rectangle in screenshot below). Only datasets are assigned DOIs; dataverses and individual files are not.
   - At the bottom of this page are various tabs, including the “Metadata” tab, where more information about the dataset can be added.
7. Click “Add & Edit Metadata” button to include additional metadata.
   
   - E.g., researchers from the Faculty of Arts may be interested in adding data in the Social Science & Humanities Metadata fields.

8. Click “Save Changes”.

This dataset draft will not be visible to the public until it is published. To publish a dataset, click the Publish button circled in red below. The dataverse that houses this dataset must also be published in order for the dataset to be published.

- Note that once published, a dataset cannot be deleted, only deaccessioned. This means that the datasets will no longer be publicly accessible, but a landing page including the basic citation metadata will remain under that URL and DOI.
Roles and Permissions

Roles can be assigned at the dataverse or dataset level. Note that if a user is assigned a role for a dataverse, they will also have that role for the datasets within that dataverse, but **not** for the sub-dataverses within that dataverse.

The permissions accorded to each role are outlined in the table below.

<table>
<thead>
<tr>
<th>Role</th>
<th>Admin</th>
<th>Curator</th>
<th>Contributor</th>
<th>Dataverse &amp; Dataset Creator</th>
<th>Dataverse Creator</th>
<th>Dataset Creator</th>
<th>Member</th>
<th>File Downloader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage roles and permissions for dataverses</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage roles and permissions for datasets</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit License + Terms for dataverses</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit License + Terms for datasets</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publish dataverses</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publish datasets</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit dataverses</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit datasets</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete unpublished dataverses</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete dataset drafts</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add dataverses</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add datasets</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View unpublished dataverses</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View unpublished datasets</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download files</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Recommendations Regarding Assigning Roles

The primary researcher will have the Admin role for their dataverse, while collaborators and research assistants can be assigned roles depending on the requirements of their position. For research assistants, we would advise that they be given the role of Curator. Note that if the dataverse is published, a Curator will be able to create and publish new sub-dataverses within the original dataverse. If the researcher is concerned about this, the role of Contributor might be more suitable for research assistants; Contributors have the ability to edit datasets, but cannot publish datasets or dataverses.

It is important to stay on top of which users have access to which permissions within your dataverse, as it could be an issue if someone with a fairly high role left the team but still had a high level of control.

Note that individuals can be assigned multiple roles if necessary, although each role must be assigned one at a time, using the process described in the following sections.

Highest Permissions Per Role

Details about the highest level of permissions for each role are as follows:

- **Admin**
  - An Admin has all permissions for dataverses, datasets, and files. They can manage roles and permissions for dataverses, publish dataverses, edit dataverses, and delete unpublished dataverses.

- **Curator**
  - The highest level permissions for a Curator are the ability to edit License + Terms for datasets, edit roles and permissions for datasets, and publish datasets.
  - Curators can also add dataverses* and datasets, and view unpublished dataverses.

- **Contributor**
  - A contributor can edit License + Terms for datasets, edit datasets, and delete dataset drafts.
  - They cannot publish datasets, but can submit them for review for possible publishing by a Curator or Admin.
  - Note that if a user is added as a Contributor to an unpublished dataverse, they will be able to view and edit the unpublished datasets within the dataverse, but they will not be able to view the landing page for the unpublished dataverse.

- **Dataverse + Dataset Creator**
  - A Dataverse + Dataset Creator can add dataverses* and datasets within a dataverse.
  - They also have the ability to publish the dataverses and datasets that they create. They cannot view unpublished dataverses or dataset drafts created by other users.

- **Dataverse Creator**
  - A Dataverse Creator can add dataverses* within a dataverse.
They can also publish the dataverses that they create, but cannot view unpublished dataverses or dataset drafts created by other users.

**Dataset Creator**
- A Dataset Creator can add datasets within a dataverse.
- They cannot publish the datasets that they create, but can submit them for review to be published by a Curator or Admin.

**Member**
- A Member can view unpublished dataverses and datasets.
- Note that a Member will only be able to view the unpublished dataverse in which they have been given permission. If that dataverse contains other unpublished dataverses, they would need to be added as a Member of those dataverses to be able to view them.

**File Downloader**
- A File Downloader can download restricted and unrestricted files from a published dataset.

*Note: Any user whose permissions include the ability to Add a Dataverse - Curators, Dataverse + Dataset Creators, and Dataverse Creators - will automatically have the Admin role for any dataverse they create. This means that they will have the ability to publish their new dataverse, as long as the parent dataverse in which it is held has been published. The Admin user for the parent dataverse will not have a role in this new dataverse, unless one is assigned by the creator of the new dataverse.*
Setting Roles and Permissions at the Dataverse Level

1. Go to the homepage for your dataverse
2. Click the Edit button
3. From the drop down menu, click Permissions

4. Click the Edit Access button (see screenshot below)
   a. The box that pops up allows you to check the overall permissions for the dataverse.
      Most administrators choose the first option after each question, to maintain the most control over the dataverse.
5. Click Users/Groups (see screenshot below)
   a. Note that roles can be removed from users in this area as well, by clicking the Remove Assigned Role button
6. Click Assign Roles to Users/Groups button
7. Search the User/Group to add by typing their name or username into the box
   a. Note that users must have an account set up with Dataverse to be found in the system and assigned a role
8. Click on the role intended for that user or group
   a. A brief explanation is given when you click on the different roles in this box. Consult the Roles and Permissions table at the beginning of this section for more detail about the access levels for each role.
9. Click Save Changes.
Setting Roles and Permissions at the Dataset Level

1. Go to the homepage for your dataset
2. Click the Edit button
3. From the drop down menu, click Permissions
4. Click Dataset

5. This brings us to the Permissions page for this dataset. Note that roles can be removed from users in this area as well, by clicking the Remove Assigned Role button next to each username under the Users/Groups section.
6. Click Assign Roles to Users/Groups button

7. Search the User/Group that you would like to add by typing their name or username into the box
8. Click on the role to grant that user or group
9. Click “Save Changes”.
Setting Permissions at the File Level

To restrict access to individual files within a dataset:

1. Go to the homepage for your dataset
2. Scroll down, and select the files you want to restrict
3. Click on the Edit Files button
4. Click “Restrict”
5. In the box that pops up, enter information about who can request access to these files into the Terms of Access field. State exactly who you would consider granting access to if only a specific group, or if never granting access put “No access granted under any circumstances”.
6. Check the “Enable request access” box if you will allow select people to have access; do not check if the Terms of Access state “No access granted under any circumstances”.
7. Click Continue button
The restricted files now have lock icons beside them. While you are logged in, the lock icon is green and open to show that restrictions are in place for these files, but they are accessible for you.

Note that no one can download restricted files from Dataverse without permission. Users must sign up for a Dataverse account to request permission.
To grant access to restricted files within a dataset for specific users:

1. Go to the homepage for your dataset
2. Click the Edit button
3. From the drop down menu, click on Permissions
4. Click on File

5. Click the Grant Access to Users/Groups button

6. Find the user or group you want to enter by typing their name in the User/Group field
7. Select the restricted file(s) to which this user will have access
8. Click Grant
Reviewing Your Roles

To find out which roles you have been assigned, you can sign in to Dataverse and follow these steps:

1. Click the drop down arrow next to your username in the top right menu
2. Click "My Data"

Your roles for each dataverse and dataset to which you have access will be noted in light blue boxes, as seen in the screenshot below. These roles only appear on the My Data page.
Setting Group Permissions

Groups can be set up to easily manage large numbers of people with the same level of access. Examples of groups might include all of your research assistants, or a group of external researchers.

To create a group:

1. Go to the homepage for your dataverse
2. Click the Edit button
3. From the drop down menu, click Groups
4. Click Create Group button
5. Fill in all required fields: Group Identifier, Group Name, and the Users/Groups to be included in this group. Note that groups can contain individual users and other groups.
6. Click Create Group.
Themes and Widgets

Themes

The visual aspects of a dataverse can be customized using the Theme feature.

1. Go to the homepage for your dataverse
2. Click the Edit button
3. From the drop down menu, click Theme + Widgets

4. From this page you can:
   a. upload an image (for example, a faculty logo, an image of the institute, etc.);
   b. change the colors used for the header, link, and text;
   c. add a tagline; or
   d. add a link to a website. This could be a link to your personal website, the website for your organization or institution, your department, journal, etc.

5. Remember to click the Save Changes button at the bottom of the screen when finished.
Widgets

The widgets feature provides code that allows you to display your dataverse on a website. Note that a dataverse must be published in order to create a widget.

1. Go to the homepage for your dataverse
2. Click the Edit button
3. From the drop down menu, click Theme + Widgets

4. Click the Widgets tab

This page provides the code to add a Dataverse Search Box or a Dataverse listing to another webpage, such as an ePortfolios page.
Dataset Templates and Guestbooks

Dataset Templates

Dataset templates are useful if you plan to publish many datasets that hold similar information or have a similar format. Templates can have prepopulated metadata fields, can provide instructions for those uploading datasets, or can have custom Terms of Use and Access statements.

To create a dataset template:

1. Go to the homepage for your dataverse
2. Click the Edit button
3. From the drop down menu, click Dataset Templates
4. This brings us to the Dataset Templates page. Click on the Create Dataset Template button to start making a new template.
   a) Note that the only field that needs to be filled is the Template Name. Fill in any other fields that will be the same for all datasets using this template.
5. Once the necessary data has been entered, click Save and Add Terms. This will bring you to the Terms of Use and Access page, where custom terms can be entered if necessary.
6. Click “Save Dataset Template”
7. This brings us back to the Manage Dataset Templates page. From here, you can click on the View button (circled in screenshot below) to see which fields contain data in each template.
Dataset Guestbooks

If you have unrestricted files available for download, you can set up a dataset guestbook to keep track of the users downloading your files.

Creating and Managing Guestbooks

1. Go to the homepage for your dataverse
2. Click the Edit button
3. From the drop down menu, click on Dataset Guestbooks

This brings us to the Manage Dataset Guestbooks page. From this page you can choose to enable an existing guestbook, or create a new one by clicking the Create Dataset Guestbook button. Custom questions can be included, which can be required or optional.
Activating a Guestbook

On the Manage Dataset Guestbooks page, the guestbook you plan to use will need to be enabled to be used with a dataset.

1. Follow steps 1-3 under the Creating and Managing Guestbooks section above to navigate to the Manage Dataset Guestbooks page
2. Click the Enable button next to the guestbook you plan to use (see screenshot below). If the guestbook has just been created, it should already be enabled.
   - Note: just because a guestbook has been enabled does not mean that it will automatically be used with datasets in your dataverse. A guestbook must also be selected within the Terms section of each dataset.

To select a guestbook to use with a specific dataset:

1. Navigate to the page for that dataset
2. Click on the Terms tab (see screenshot below). The Guestbook section further down on the page will show whether a guestbook is currently being used with this dataset.
3. Click on the Edit Terms Requirements button
4. Scroll down to select the guestbook to use with this dataset
5. Click the Save Changes button.