



## **Guide: submit a study and deposit data**

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## 1. Log into SWISSUbase with your SWITCH edu-ID

### 1.1. Use your SWITCH edu-ID

If you have a Switch edu-ID account, you can use it to log into SWISSUbase.

Catalogue

EN

DE

FR

Register

Login



### 1.2. Create a SWITCH edu-ID account

If you don't have an edu-id account yet, go to the SWITCH edu-ID website (<http://eduid.ch>) and click on the «Create an account» button.

Once your account is created, you will be able to log into SWISSUbase using it.



NOTE: If you have problems logging in or creating a SWITCH account, please contact [eduid-support@switch.ch](mailto:eduid-support@switch.ch)

### Infobox: The conditions concerning institutional affiliation



- In order to download the data made available with a contract, you need to be affiliated with an academic institution in Switzerland.
- If you are not affiliated with a Swiss academic institution, you have to request validation of your account.
- In order to deposit data, you must be registered with one of the partner institutions or choose social sciences as scientific domain when creating a study.


## 2. Create and submit a new study

### 2.1. Create a study

#### 2.1.1 Click on «My studies»



#### 2.1.2 Click on «Create a new study»

A dark blue button with a white plus sign and the text 'Create new study'.

#### 2.1.3 Add the metadata on the study level:

- Scientific domain
- Data curated by
- Study title



NOTE: For more visibility it is recommended to write the title in several languages. The title in English is mandatory to be able to deposit data.

- Study language
- Author(s)

#### 2.1.4 Click on «Create»

A dark blue button with a white plus sign and the text 'Create'.

Your study is in editing phase.

A dark blue button with a white circle and the text 'Editing'.

## Infobox: Add people and manage roles and permissions



- In SWISSUbase at least one author should have the permission to submit: The person creating a new study is automatically assigned the “**Principal Investigator**” role and the permission to “**Submit**” a study or a dataset, to add people and attribute roles and permissions to others.
- Linking people who work on the study as well as their institutional affiliation(s), increases the visibility of the study but can also be a legal issue. It is possible to add other people to the study at this stage (although it can also be done later on in the block Overview: see 2.2.1).

The screenshot shows a form with two sections. The top section is labeled 'Institution(s)' and contains a hyphen '-' followed by a blue 'Add' button with a plus icon. The bottom section is labeled 'Author(s)' with a red dot next to it, followed by a blue 'Add' button with a plus icon.

- To **add people** at this stage, click on the “Add” button, search for the person who needs to be added, and assign one of the four **roles** and one of the four **permissions**. If you don’t find the person to be added, it is possible to do it manually.

The screenshot shows a dropdown menu titled 'Role' with a red dot. The menu items are: 'Principal investigator' (highlighted in blue), 'Scientific collaborator', 'Administrative collaborator', and 'No Role'.

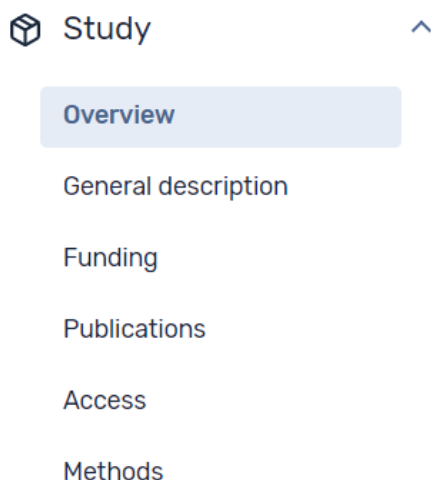
The screenshot shows a dropdown menu titled 'Permission' with a red dot. The menu items are: 'Submit' (highlighted in blue), 'Manage', 'Edit', and 'None'.

- If needed, individuals and the institution which they are affiliated with can be added once the study is created in the block «Overview». Similarly, roles and permissions can also be modified later on in the block «Overview».
- Note that at least one author must have the permission to submit and that people who have been assigned the role of administrative collaborator or no role are linked to the study but do not appear in the catalog, even though they may have all kinds of permissions (Edit, Manage or Submit).
- Regardless of the role assigned, four kinds of permissions can be assigned:
  - Edit allows changing metadata
  - Manage allows changing metadata, adding data and documentation
  - Submit allows changing metadata, adding data and documentation, submit study, data and documentation
  - None doesn’t give any permission

## 2.2. Submit a study

To be able to submit the study, it is necessary to complete your study description.

### 2.2.1 Go to each study block: Overview – General description – Funding – Publications – Access – Methods



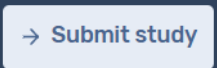
For each of these blocks, click on “Edit” to add the metadata 

and then click on “Save” 

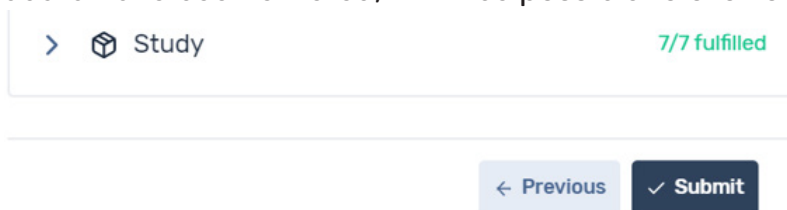
### Pay attention

- Documenting the study and completing metadata increases visibility and accessibility of your study.
- Bibliographies as .ris or .text files can be imported via the «Publications» block.
- Participating institutions can be linked to your study via the “Overview” block.
- An abstract in English must be added via the “General description” block to be able to deposit data.

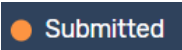
### 2.2.2 Once the metadata have been completed, click on «Submit study» and follow the instructions

 → Submit study

If all mandatory metadata have been entered, it will be possible to click on “Submit”.



If not, the missing metadata will be indicated and it will be necessary to complete them.

Once your study is submitted  our team of archivists carries out the quality control for its publication. Once these checks are completed, the study is published in the catalog.

The next steps describe the deposit of datasets.

### 3. Deposit dataset(s) and documentation

#### 3.1. Create datasets

If you just submitted your study, go directly to point 3.1.4.

3.1.1. Click on «My studies» and choose the study to which you want to add a dataset

3.1.2. Go into «Datasets» by navigation

3.1.3. Click on the button «Add dataset»

 + Add dataset

 Study

 Datasets 

 Files

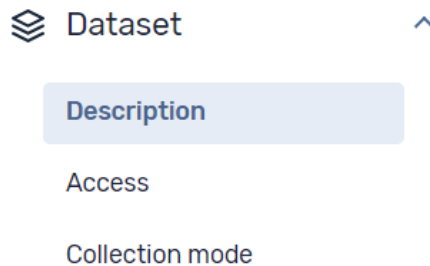
3.1.4. Describe the dataset by completing the necessary metadata

Once these metadata have been completed, click on «Create»

 + Create

The dataset is now created, but to be able to deposit a dataset, it is necessary to complete the other dataset metadata.

3.1.5. Go to each dataset block: Description – Access – Collection mode



For each of these blocks, click on “Edit” to add the metadata and then click on “Save”

 Edit

 Save

#### Infobox: Restrictions and special permissions



- In SWISSUbase, it is possible to set restrictions on the use of the deposited data as well as special permissions.
- There are three kinds of **restrictions** to choose from: “None” – “Academic research and teaching” – “Academic research only”.
- Concerning the **special permissions**, you can choose between “None” and “With prior agreement of author”, which means that in order in order to download data that need prior agreement of authors, a request is sent to the author who can accept or deny access to the data.

NOTE: If you want to add a restriction, you will need to choose the **closed contract** as a **usage license** and not one of the Creative Commons licenses. If you choose to publish your data under a Creative Commons license, please choose “None” in the restriction field.



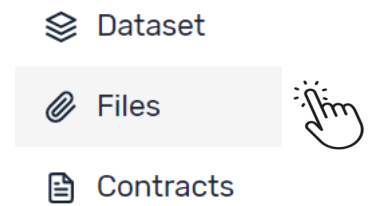
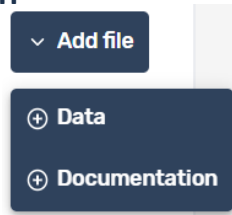
### 3.2. Add data file(s)

Once all the metadata fields describing the dataset(s) are completed, the files (physical files) can be uploaded following the next steps:

#### 3.2.1. Go into «Files» by navigation

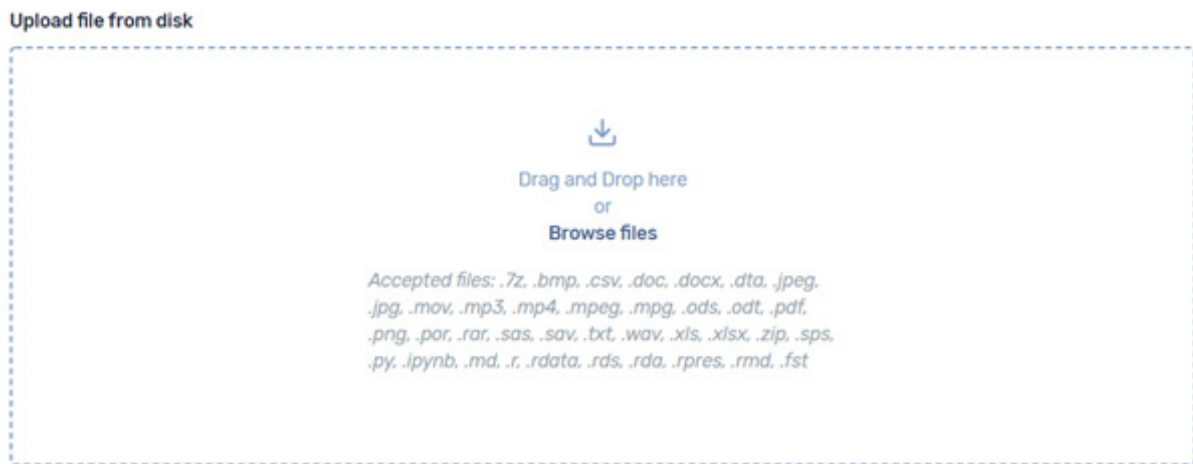
#### 3.2.2. Click on «Add file»

and choose to add «Data»



#### 3.2.3. Complete the metadata, upload a data file, and then click on «Create »

**Create**



Once uploaded, complete the Data file metadata:

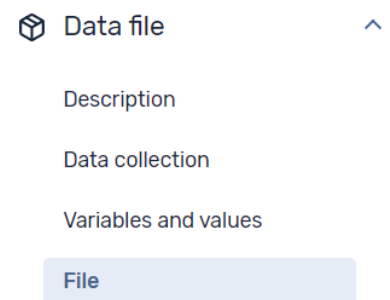
#### 3.2.4. Go to each data file block: Description – Data collection – Variables and values

For each of these blocks, add the metadata

by clicking on “Edit”



and then on “Save”



Once the metadata for each of these blocks have been completed, it is necessary to return to the dataset level by clicking on “Dataset” on the breadcrumb.



Catalogue

My studies

My downloads

My Studies // Study 20023 // Dataset 2021 // File 30042



To add other “Data file(s)” related to the study, repeat the points 3.2.1 to 3.2.4 as many times as necessary.


### 3.3. Add documentation

Once “Data file(s)” has been added, the “Documentation” can be uploaded following the next steps:

#### 3.3.1. Go to «Files» by navigation

 Dataset

 Files 

 Contracts

#### 3.3.2. Click on «Add file» and choose to add «Documentation»

 Add file

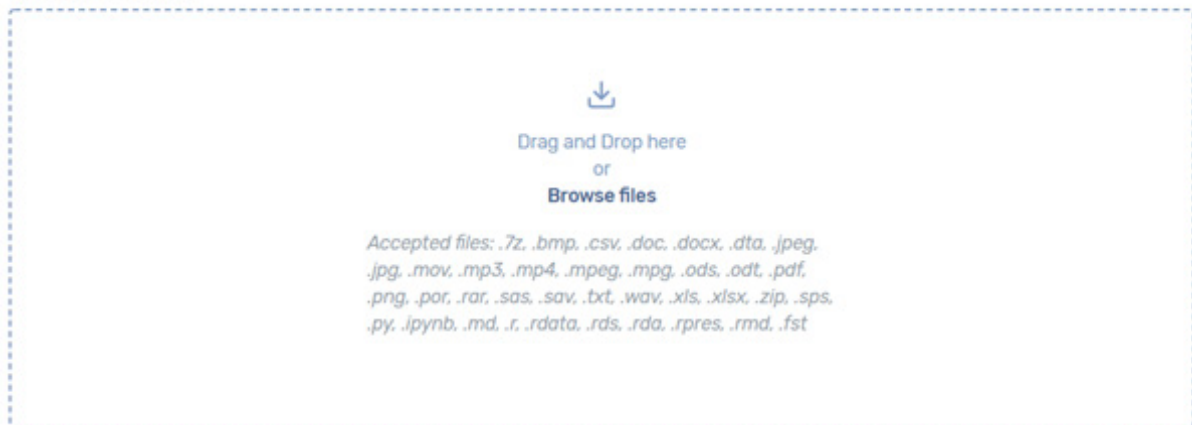
 Data

 Documentation

#### 3.3.3. Complete the metadata, upload a documentation file and then click on «Create»

 Create

Upload file from disk



Once the documentation is uploaded, it is necessary to return to the dataset level by clicking on Dataset on the breadcrumb.

SWISS  base

Catalogue

My studies

My downloads

My Studies // Study 20023 // Dataset 2021 // File 30042



To add other “Documentation files” related to the dataset, repeat the points 3.3.1 to 3.3.2 as many times as necessary.

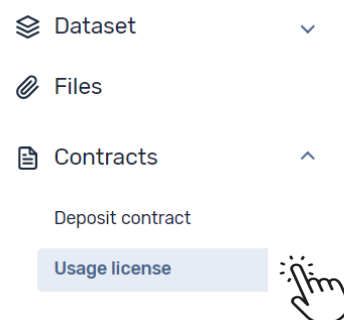
Once all the Data files and Documentation files have been uploaded, it is necessary to return to the dataset level by clicking on Dataset on the breadcrumb to select a “Usage licence”.



### 3.4. Select a Usage license

#### 3.4.1. Go into «Contracts» by navigation

#### 3.4.2. Click on «Usage license»



#### 3.4.3. And then click on «Select license»

#### 3.4.4. Confirm that you are the owner of the data or that you are allowed to publish the data

#### 3.4.5. Confirm that the dataset does not consist of any personal data OR that all individuals have been informed about the publication of data or given their consent

I confirm that •

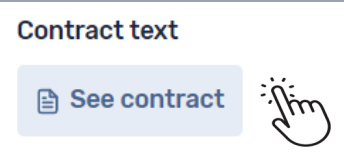


I am the owner of the data OR I have the authorization to publish the data OR the dataset consists of other data under a license that allows republication.

I confirm that •

- The dataset does not consist of any personal data.
- The dataset consists of personal data, all individuals have been informed about the publication of the data and/or have given their consent.

#### 3.4.6. «Select» an appropriate license and click on «Save»

### Infobox: Contract and Licences

- After saving, the contract selected can be viewed by clicking on “See contract” 
- If after reading it you want to select another license, click on «Edit» 
- Select the appropriate license and click on «Save» 

Once the appropriate “Usage license” has been selected, it is possible to finalize the deposit process as described in the next step.



NOTE: The “Deposit contract” cannot be accepted at this stage but will have to be accepted during the finalization of the deposit process.

### 3.5. Deposit dataset

Once the Usage license has been accepted, the dataset can be deposited.

#### 3.5.1. Click on «Deposit dataset» and follow the instructions

↑ Deposit dataset

If **all conditions have been fulfilled** concerning the “Study”, the “Datasets” and the “Files”, it will be possible to accept the “Deposit contract”, to check the “Usage license” selected, and finalize the deposit process.

#### 3.5.2. Click on «Deposit dataset»

↑ Deposit dataset

## Deposit dataset ×


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1  
Explanations


2  
Conditions

3  
Deposit contract

4  
Usage license

>  Study7/7 fulfilled

>  Datasets3/3 fulfilled

>  Files6/6 fulfilled

If **not all the conditions have been fulfilled**, they can be completed one by one. The conditions that still need to be completed will be indicated.

#### 3.5.3. To fulfill the missing conditions, click on «Update»

 Update


Complete the necessary information

Click on «Save» and then click again on «Deposit dataset»

↑ Deposit dataset

Repeat this procedure as many times as needed until all conditions are met.

Once all conditions are met, your dataset can be submitted.

 Submitted

Our team of archivists carries out the quality control for its publication.

Once these checks are completed, the dataset(s) is/are published in the catalog.