



User Guide

**Submit your study and
deposit data**

For more information, please contact:

support@swissubase.ch

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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.



1.2 Create a SWITCH edu-ID account

If you don't have a SWITCH edu-id account, 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 your SWITCH edu-ID.

ⓘ NOTE: **If you have problems logging in or creating a SWITCH account, please contact eduid-support@switch.ch**

ⓘ INFO: **Conditions concerning institutional affiliation**

- **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: support@swissubase.ch.**
- **To deposit data, you must be registered with one of the partner institutions (FORS, UNIL, UZH) or be part of the discipline-specific communities: social sciences or linguistics.**

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 new study»



2.1.3 Add the metadata for the Study:

- > **Scientific domain**
- > **Study title** 
- > **Study description language**
- > **Author(s)**

 **NOTE:** For increased visibility of your data, it is recommended to write the title in several languages. The title in English is mandatory to submit the data.

2.1.4 Click on «Create»

 Create

Your study is now in editing status.

 Editing

INFO: Conditions concerning Author(s)

- > **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.**
- > **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.**

Role 

Principal investigator
Scientific collaborator
Administrative collaborator
No Role

Permission 

Submit
Manage
Edit
None

- > **If needed, individuals and the institution which they are affiliated with can be added once the study is created in the block «Overview: see 2.2.1». Similarly, roles and permissions can also be modified later in the block «Overview».**

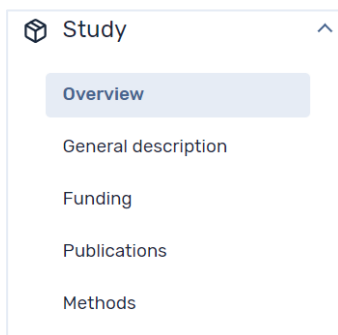
- > **Note that at least one author must have the permission to submit and that people who have been assigned the role of administrative collaborator or no role are linked to the study but do not appear in the catalog, even though they may have all kinds of permissions (Edit, Manage or Submit).**
- > **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; Submitting the study, data and documentation**
 - **“None” allows read-only permission**

2.2 Submit a study

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

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

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



2.2.1.1 Study Overview – metadata fields in the Study Overview block:

- > **Study title**
- > **Study description language**
- > **Institution(s)**
- > **Author(s)**
- > **Main Disciplines**
- > **Study Progress**
- > **Start Date**
- > **End Date**
- > **Data Availability**

INFO: Conditions concerning Institution(s)

Link Institutions to your study and with the collaborating author(s) in the Edit mode → Institutions → Add.

Institution(s)

-

 Add

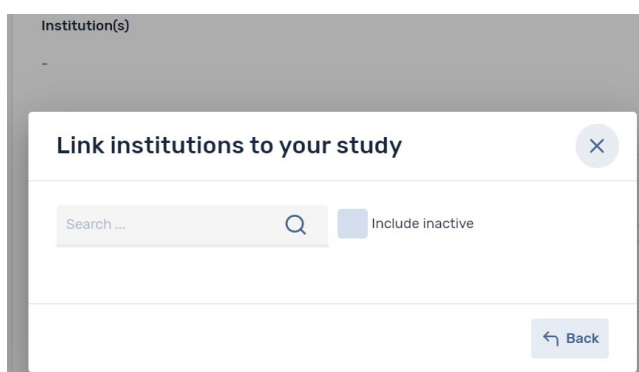


Author(s) 

 Add

Search for the institution(s) that carry out the research to link them to the study and the collaborating authors. If the institution is not yet in the list of available institutions, you can add a new one. Newly created institutions must be validated by the data curators to avoid duplicates.

Once you have listed the collaborating institutions, you can link the collaborating authors, with their respective institutions, in the “Author(s) field.



For more information on the metadata fields required for the Study, please use the [Metadata Guide](#).

ATTENTION

- > **Documenting the study and completing metadata increases visibility and accessibility of your study.**
- > **An abstract in English must be added via the “General description” block to be able to deposit data.**
- > **Bibliographies as .ris or .txt files can be imported in the “Publications” block.**

2.2.2 Once the metadata have been completed, move to the next step by clicking on «Submit study» → **Submit study** and follow the instructions.

If all mandatory metadata have been entered, you can “Submit”.

Submit study

1 Explanations 2 Conditions

Study 7/7 fulfilled

- Study must be in editing.
- Overview documentation is complete.
- General description documentation is complete.
- Access documentation is complete.
- If you want to deposit a dataset later on, you have to enter the study title at least in the study language and in English.
- If you want to deposit a dataset later on, you have to enter the abstract at least in English.
- Methods documentation is complete

Previous Submit

If not complete, the missing necessary metadata will be indicated, which you must complete to submit.

Once your study is submitted **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 linked to your study, which is highly encouraged to increase the reusability of your work.

3. DEPOSIT DATASET(S) AND DOCUMENTATION

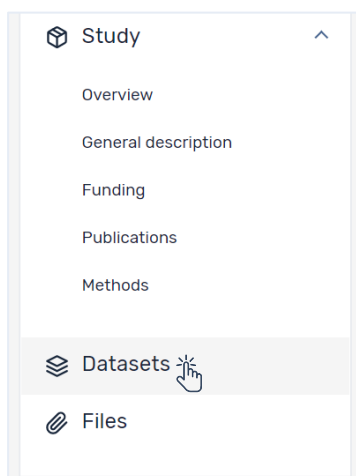
3.1 Create datasets

A dataset consists of a data file, or several data files, and data-related documentation.

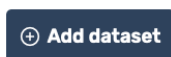
If you just submitted your study, go directly to point 3.1.4.

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»



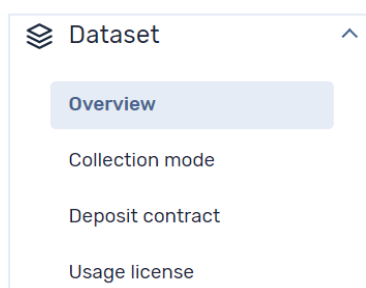
3.1.4. Describe the dataset by completing the necessary metadata.

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



The dataset is now created, but to be able to submit it, please complete the relevant metadata.

3.1.5. Go to each dataset block: Overview - Collection mode - Deposit Contract - Usage License



For each of these blocks, click on "Edit" to add the metadata  **and then click on "Save"**  **.**

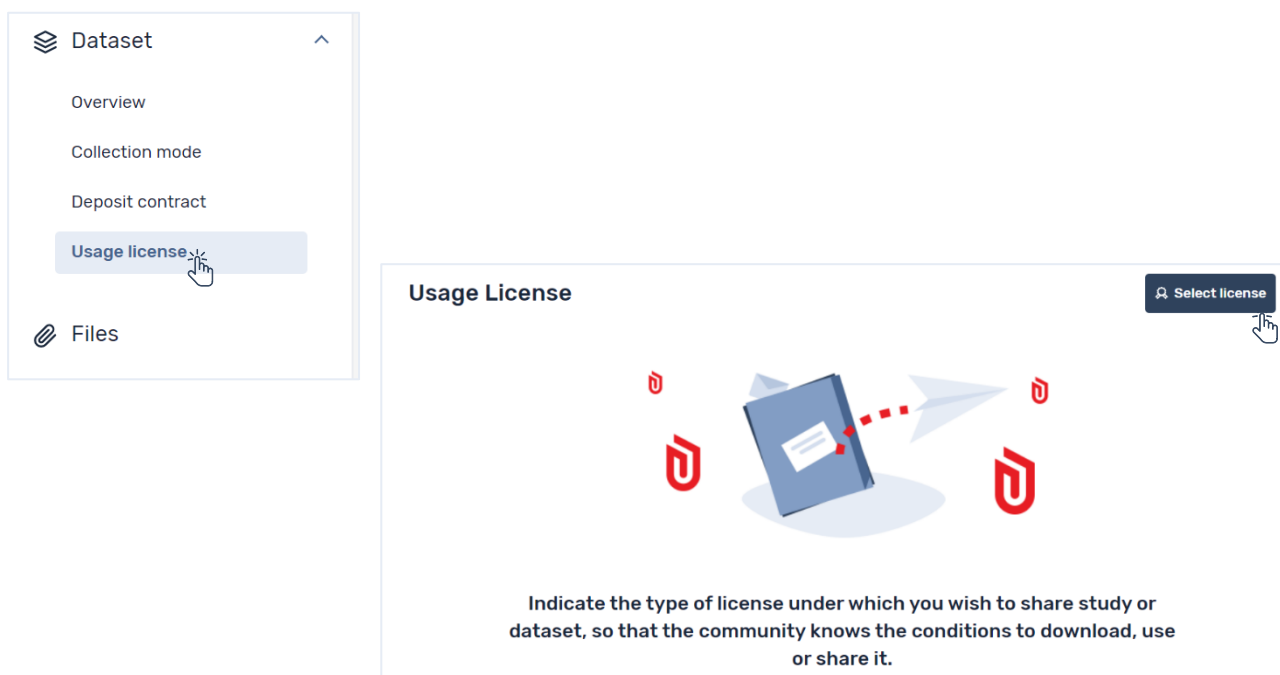
For more information about the block Collection Mode, see the [Data Documentation Glossary for the Social Sciences](#).

For more information on the metadata fields required for the Study, please access here the [Metadata Guide](#).

3.2 Select a usage license

To deposit a dataset, you will need to select a Usage License.

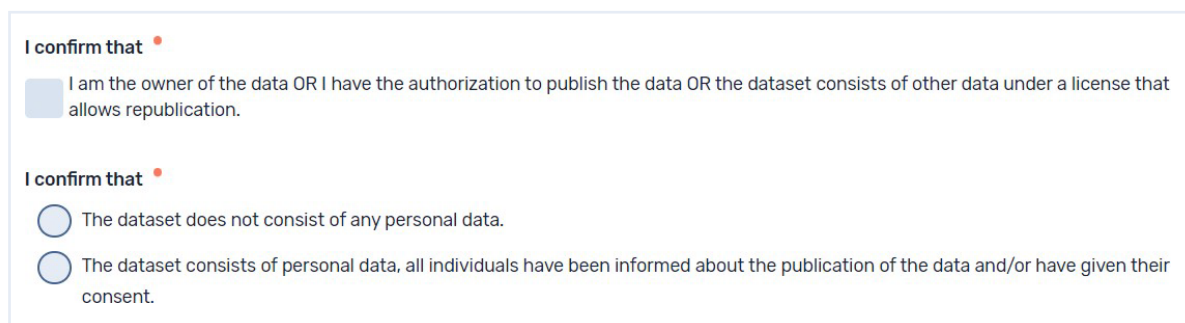
3.2.1 Click on the block “Usage License” and then “Select License”



The screenshot shows a sidebar on the left with a 'Dataset' section containing links for 'Overview', 'Collection mode', 'Deposit contract', 'Usage license', and 'Files'. The 'Usage license' link is highlighted with a mouse cursor. The main content area is titled 'Usage License' and features a central illustration of a blue folder with a red arrow pointing to a red 'U' logo. Below the illustration, text reads: 'Indicate the type of license under which you wish to share study or dataset, so that the community knows the conditions to download, use or share it.' A 'Select license' button is located in the top right corner of the main area, also with a mouse cursor pointing to it.

3.2.2 Confirm that you are the owner of the data or that you have authorization to publish data.

3.2.3 Confirm that the dataset does not contain any personal data OR that all individuals have been informed about the publication of data and/or have given their consent.










The screenshot shows two confirmation sections. The first section, titled 'I confirm that', has a checked checkbox and the text: '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.' The second section, also titled 'I confirm that', has two radio button options: 'The dataset does not consist of any personal data.' (which is selected) and 'The dataset consists of personal data, all individuals have been informed about the publication of the data and/or have given their consent.'

3.2.4 Select the appropriate license by clicking the “Select” button

⚠ Important: If your dataset consists of other licensed data, choose a license that complies with the original license(s).


Each license option is described in further detail by clicking on each box.

Licenses selection •

>	 Closed contract 	✓ Select
>	 License Creative Commons BY	✓ Select
>	 License Creative Commons BY-SA	✓ Select
>	 License Creative Commons BY-NC	✓ Select
>	 License Creative Commons BY-NC-SA	✓ Select
>	 License Creative Commons BY-ND	✓ Select

ATTENTION

If you want to set restrictions and special permissions on the use of deposited data, you must choose the “Closed Contract” usage license.

✓  Closed contract ✓ Select

A closed contract is a bilateral contract between the end user and the responsible Data Service Unit for data where there is a potential disclosure risk.

Restriction •

Please select ▼

Special permission •

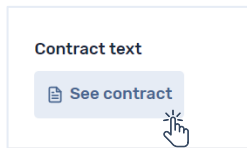
Please select ▼

Restrictions and Special Permission

- > **Restrictions:** There are three types of restrictions to choose from: “None”; “Academic research & teaching”; and “Academic research only.”
- > **Special permission:** you can select “None” or “With prior agreement of author”. Prior agreement means that the corresponding author will be notified of a request to download their data, in which the author can accept or deny.
- > If you select the “Prior Agreement” option, remember that in the author information on Study level, you must also select the option “Notify Download”.

Once you've selected the contract, click "Save"  .

The contract text can be viewed by clicking "See contract".



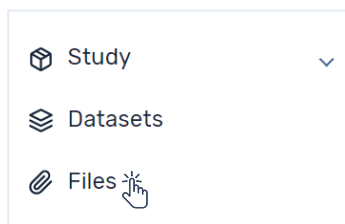
If you want to select another contract, click on "Edit"  . Select the appropriate license and click "Save"  .

- ① The Deposit Contract can be accepted during the finalization of the deposit process.

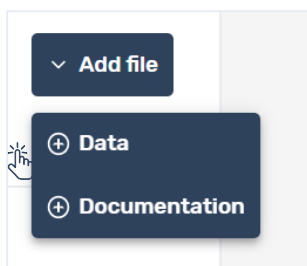
3.3 Add data file(s)

Once the dataset information is complete, the physical data file(s) can be uploaded.

3.3.1 Click on the Files block




3.3.2 Click on the "Add file" and choose "Data"



3.3.3 Complete the metadata, upload a file and then click “Create”

Upload file from disk


Drag and Drop here
or
Browse files

Accepted files: .7z, .bmp, .csv, .doc, .docx, .dta, .jpeg, .jpg, .mov, .mp3, .mp4, .mpeg, .mpg, .ods, .odt, .pdf, .png, .por, .rar, .sas, .sav, .txt, .wav, .xls, .xlsx, .zip, .sps, .py, .ipynb, .md, .r, .rdata, .rds, .rda, .rpres, .rmd, .fst


3.3.4 Go to each block and complete the necessary metadata: Overview – Data collection – Variables and values – File


3.3.4.1 Dataset Overview – metadata fields in the Dataset Overview block:

- > **Dataset title**
- > **Dataset description language**
- > **Dataset description**
- > **Remarks about the documentation**
- > **Embargo end date**
- > **Publication date**
- > **Bibliographical citation**

INFO: Request a DOI

This is optional. Your dataset will be attributed a DOI when you submit it, however you can request a DOI now if you need to cite the DOI in advance of publication. Please note that a pre-requested DOI will only be functional once your data is published.

Dataset Overview 

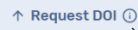

Dataset title 

EN DE


Dataset 2

DOI



–

 Request DOI 

 **Once a DOI is requested, it cannot be reverted.**

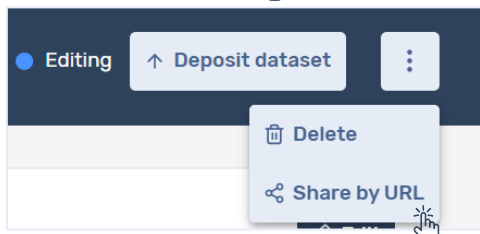
Are you sure ? 

Are you sure you want to request a DOI, this action can not be reverted ?

 Cancel 

INFO: Share by URL

You can also share a dataset in advance of it being published (e.g. for a journal reviewer or ethics committee) via a time-limited URL by clicking this symbol  located by the “Deposit data” button.



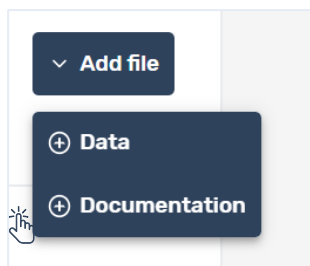
For more information about the Data Collection and Variables and Values blocks, see the [Data Documentation Glossary for the Social Sciences](#).

You can repeat these steps and add all relevant data files.

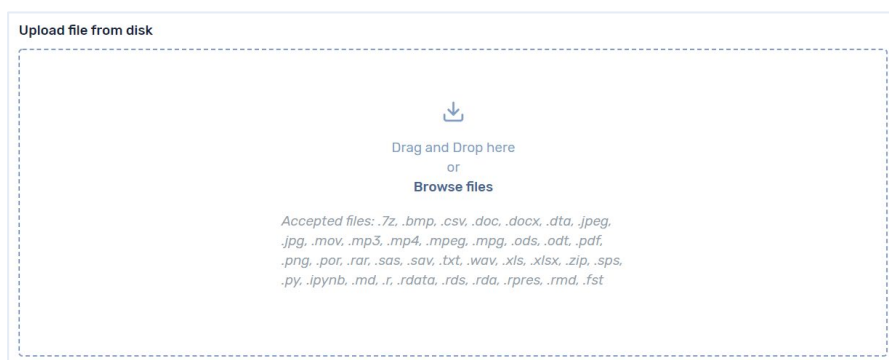
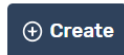
3.4 Add documentation

Add any documentation that is relevant for the archival and reuse of your data.

3.4.1 In the Files block, go to “Add File” and choose “Documentation”.



3.4.2 Complete the metadata, upload a documentation file and then click “Create”



You can add any relevant documentation files.

NOTE

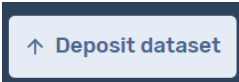
You can add multiple datasets that are linked to a study.

My Studies // Study 20058 // Dataset 2053

To do this, click on your Study and then go to  to add and describe another dataset.

3.5 Deposit your data

Now you are ready to deposit your data! Go to the Dataset block and click on “Deposit dataset” .



Follow the instructions in the dialog box to guide you through the last steps.

The dialog box provides a summary of the completeness of the metadata for the “Study”, “Datasets” and “Files”.

Deposit dataset

1

2

3

4


Explanations

Conditions

Deposit contract


Usage license

>

 Study


4/6 fulfilled

>

 Datasets

1/2 fulfilled

>

 Files

4/8 fulfilled

3.5.1 Complete any missing information

Complete all required information by clicking on each block and then click on “Update” .

You will be directed to the right fields to complete.

When all conditions are fulfilled, you can accept the Deposit Contract.

☒ I accept the deposit contract

You will then see your selected usage license and you are ready to click “Deposit data”.

[← Previous](#) [↑ Deposit dataset](#)

Your data has been submitted Submitted **and the data curators for your discipline or institution will be notified, to begin the quality checks on the data and metadata.**

Once these checks are finished, your data will be published in the SWISSUbase public catalogue.

