

## Metadata Guide

This document provides a description of all metadata (mandatory and non-mandatory) for creating studies and depositing data in SWISSUbase.

### STUDY

#### Create New Study

##### Scientific domain

Select the scientific domain of your research. Selection of the domain determines the metadata associated with your discipline, ensuring an in-depth description of your study and/or your data. Rich metadata increases the discoverability of your research.

##### Study title

Add the study title in the study language. Please be aware that to deposit a dataset, a title in English is mandatory. If there is a translation available, you can enter it under the corresponding language tab.

##### Study description language

Please enter the main language of the research project.

##### Author(s)

By default, the person who creates the study will be attributed the role of Principal Investigator (PI) and the permission to submit data. Both attributes can be changed once the study has been created.

Please search for the collaborating author(s) that carry out the research to link them to the study. If the author is not yet in the list, you can add a new entry by adding first name, last name and his/her email address. Newly added author(s) cannot be attributed permissions until they have created a SWISSUbase account.

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#### Study Overview

##### Study title

Add the study title in the study language. Please be aware that to deposit a dataset, a title in English is mandatory. If there is a translation available, you can enter it under the corresponding language tab.

##### Study description language

Please enter the main language of the research project.

### **Institution(s)**

Please 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 field below: Author(s).

### **Author(s)**

You can add collaborating author(s) that carry out the research to link them to the study. You can specify which institution the researcher is affiliated with (added in the "Create New Study" step). By default, an added author is checked as a current collaborator. If he/she is not part of the research team anymore, please uncheck the box. Authors with the role "Administrative collaborator" will not appear in the catalogue.

By clicking the collaborator name and then Edit, you can link the institution in which the collaborator belongs, in addition to updating the attributes such as role, permissions and communication preferences.

Be aware that you must select "Notify Download" if you would like to be notified if your data is downloaded and/or the wish for "Prior Agreement" for request and approval of users to download your data.

### **Main discipline(s)**

Please choose all disciplines that apply to the study.

### **Study progress**

What is the current progress of the project (e.g. planned, running, finished, etc)?

### **Start Date / End Date**

Please indicate the planned or actual dates of the start and the end of the research project. For managing updates, an indication of the end date is essential, even if it is only temporary.

For periodic surveys that will continue, the end date may remain free.

### **Data availability**

You can provide here any information concerning access to the data. If you intend to deposit the data on SWISSUbase, you can note the planned deposit date. If you intend to deposit the data outside of SWISSUbase, please provide the website or repository in which you will deposit the data.

## General Description

### Period

Please enter the period covered by the project, e.g. 1939-1945. This is not necessarily the same as the length of the research project.

### Geographical area

Indicate the region in which the study was conducted.

### Additional geographical information

Add more specific details on geographical information if applicable, e.g. cantons, communes, etc.

### Abstract

The background / context of the research, objectives and strategy, problem addressed, theoretical framework, hypotheses and practical application of the results. If you have an abstract in another language, please enter it in the corresponding tab.

The description may vary in length according to the purpose of the research (data analysis, theoretical research, methodological development, etc.), and the degree of study completion.

### Results

Please enter the main or intermediate results. This can be updated during the term of the project.

## Funding

### Study type

Please select in the drop-down menu the type of research (select all that apply). If you choose "mandated research", adding a mandating institution is required.

### Funding

Please select in the drop-down menu the funding scheme for your research project (select all that apply).

### SNSF Nr.

Please enter the SNSF reference number of your grant.

### NRP Nr.

Please select the number of the NRP.

## **NCCR**

Please select the name of the NCCR mode of data collection.

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## **Publications**

### **Publications and Unpublished Documents**

Please add the publications (monographs, journal articles, reports, etc) that directly resulted from the research project, indicating the complete reference: author(s), title, series or journal, editor, place and date of the publication, URL, DOI, etc.

You can import a .ris or .txt file that you have exported from your preferred reference management tool (Zotero or Endnotes). Your publications or unpublished documents will be automatically displayed in the relevant section.

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## **DATASET**

### **Dataset description**

#### **Dataset title**

The title of the dataset should provide details with respect to the methodology, topic, population or temporality of the data, which will later facilitate findability. For example, one dataset of the project "Situation of women in Switzerland" is called "Survey among single women - 1971". Information contained in the title, in particular the year of data collection, is crucial for users to find your data upon searching the catalogue.

#### **Dataset description language**

Please choose the main language in which the dataset is described.

#### **DOI**

The DOI will be automatically attributed when the dataset is published.

#### **Request a DOI**

This is optional. Your dataset will be attributed a DOI whether you request it or not. If you request a DOI now, it will be functional only when the dataset is published. However, you can already use the requested DOI to cite your dataset before publication.

#### **Dataset description**

Please give a short description of the dataset, as well as any extra information you feel is important for the reuse of the deposited data.

### **Remarks about the documentation**

To facilitate reuse of your data, please add any comments concerning the dataset documentation, as well as any practical considerations with respect to documentation use.

### **System version number**

This number is automatically generated

### **Embargo date**

Date when the data can be publicly shared. If a submitted dataset is under embargo, it will appear in the catalogue but will not be available for download until the embargo date.

### **Bibliographical citation**

This is the standard bibliographical citation suggested by SWISSUbase. It is based on the information contained within the system and is updated automatically when you edit key information.

### **I would like to modify**

Check this box to modify the standard bibliographical citation suggested by default.

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## **Usage License**

Indicate the type of license under which you wish to share your data, so that the community knows the conditions to download, use or share it.

### **If you select the Closed Contract option, you will also need to indicate the Restrictions and Special Permission for the dataset usage:**

#### **Restriction**

Access to the data can be limited to certain uses only. If the data is shared with a Closed Contract, only registered SWISSUbase users can be granted access to the data. With this option, data cannot be used for commercial purposes.

Values in the drop-down menu are increasingly restrictive. "None" means that data are available for all types of usages that are not explicitly excluded in the user contract. This includes for example, research carried out by interest groups (political parties, associations, unions), journalists, or private institutes carrying out research mandates in the public interest.

### **Special permission**

You can control the access to your data by requiring prior agreement for authorization of the download of your data. If you choose this option you will receive by e-mail a copy of each request to download your data, together with the details of the person who is requesting the data and a brief description of the intended analyses. Data will be released only after you grant approval. By choosing this option you commit yourself to answering requests within a few days.

Beyond this time limit, the responsible Data Service Unit reserves the right to decide on your behalf.

Please note if you select the Prior Agreement for authorization, you must also select the option "Notify Download" in your author details in the Study section.

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## **DATA FILE**

### **Data file description**

#### **File title**

Please give a title briefly describing the contents of the file.

#### **Remarks**

You can enter here any remarks that relate to the data file.

#### **Data anonymised**

By checking this box, you attest that the anonymisation of the data has been carried out as completely as possible. This is a necessary condition for the deposit of data. Exemptions from complete anonymisation are possible but should be justified in the field below.

#### **Anonymisation remarks**

Please note here all information related to the anonymisation of the data.

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## **Documentation description**

#### **File title**

Please give a title briefly describing the contents of the file.

#### **Documentation type**

Please indicate the type of documentation you've uploaded.

**Remarks**

You can enter here any remarks that relate to the documentation.

**Public access (catalogue)**

Click here if you want the documentation available in the public catalogue that is visible for the general public (users without a SWISSUbase account).