Some users, such as data managers, have more options to customize and control the way their dataverses look and act.

Creating New (sub-)Dataverses

From the main page of the dataverse within which you’d like to create a sub-dataverse (for example, the main UBC institutional dataverse) click +Add Data -> New Dataverse. Fill in the form with your desired specifications, and click Create Dataverse. The dataverse can then be accessed from the ‘Dataverses’ link in the search column to the left, or in the Results listing within its host dataverse.

Customize your Dataverse

On the main page for the dataverse you want to customize, click the Edit button in the upper right of the screen. You will then see a dropdown menu with several options. Some which may be useful to you are:

- General Information
- Theme + Widgets
- Permissions
- Groups
- Dataset Templates
- Dataset Guestbooks

General Information

Change basic information about the dataverse, such as:

⇒ name
⇒ Description
⇒ URL
⇒ Contact information
⇒ category (institutional, lab, research group...)
⇒ Metadata (what fields are available and/or required for deposited Affiliation)

Theme + Widgets

Theme
Here you can change the look of the dataverse, including colour scheme, or adding a logo, tagline, and website link.

Widgets
If you want to provide easy access to your dataverse or a dataset on your personal or project website, Scholars Portal provides code for two widgets:

- Dataverse Search Box—allows users to search your dataverse without leaving your site
- Dataverse Listings—shows all your dataverses and datasets and allows users to view their contents and even download files directly from your site.

To get the widget code,
⇒ For a Dataverse: Edit-> Theme & Widgets-> Widget tab.
⇒ For datasets: Edit -> Thumbnail & Widgets
Copy the code displayed and paste it into your website’s HTML.

Permissions

Here you can refine who has access to your dataverse, and what actions they can perform. The Permissions page has the following tabs:

Permissions
Edit Access allows you to decide who can create new sub-dataverses and datasets. You can also set the Role that is automatically assigned to those depositing datasets, which determines their editing permissions (recommended role: Contributor).

Users/Groups
Click Assign Roles to Users/Groups (must know their user/group name. The UBC Dataverse has 8 possible roles with differing levels of permissions. You can also Remove Assigned Roles.

Roles
Shows you the permitted actions for each Role.

Groups

If you need to assign different roles to many different users (e.g. multiple collaborators, research groups) creating Groups can streamline the process.

Click +Create Group. Assign the Group a name, identifier, description, and users (or sub-Groups). You can type the user’s name or User ID, and Dataverse will suggest matching users.

Once the group is created, you can Edit or Delete it from the Groups page. Groups can then be assigned Roles from the Permissions page (described above).

Dataset Templates

Custom Templates
If you will be uploading a lot of files with some identical metadata (e.g. several files in a series with the same authors, dates, keywords, etc) you can create custom templates to autofill those fields.

In the dataverse where you want the template, click Edit -> Dataset Templates -> +Create Dataset Template. This will open a form with every possible metadata field. Fill in the fields with the information you want to be autofilled for all datasets using that Template. Then give the Template a name, and click Save + Add Terms.

Next, you will fill in any terms, conditions, or requirements for using data assigned that Template. To finish, click Save Dataset Template. The Template will now appear on the Dataset Templates page, where it can be viewed, edited, or deleted.

Dataset Guestbooks

Guestbooks is another way to further control your data access. Once you create a Guestbook, when a user attempts to download a dataset, a popup will ask them for information you specify, e.g. Name, Institution, or custom questions. Any of these questions can be set as Required to permit the download.

Questions? Contact research.data@ubc.ca