**IAI OPEN DATA CATALOG**

**DATA UPLOADING INSTRUCTIONS**

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# 1. Getting started

* Register to Harvard Dataverse at https://dataverse.harvard.edu/.
* Contact the IAI (iai@dir.iai.int) to provide access to the data uploading functionality of the IAI Open Data Catalog.
* Once access has been granted, you can upload data. First, log into the [IAI](https://dataverse.harvard.edu/dataverse/IAI) Open Data Catalog.
* Select a topic that best describes your research:
  + Atmosphere, Ocean and Freshwater processes
  + Climate Variability in the Americas
  + Ecosystems, biodiversity and land use
  + Human Dimensions and Applications

You are now ready to upload data. Metadata can be provided either in English or Spanish.

# 2. Saving the metadata and data

* Select Add Data - New Dataset:

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* Keep the default dataset template (“Inter-American Institute for Global Change Research”).
* Add citation metadata as instructed below. Self-explanatory fields are omitted from the instructions. Please note that each field has a tooltip that can be seen by hovering the mouse over the caption:



* All fields marked with an asterisk are required. Optional fields can be left blank.

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| --- | --- |
| **CITATION METADATA** | |
| **Field** | **Description** |
| Title | Title of the research |
| Author, name | The names of all the authors of the research. Add more authors when needed using the plus -sign. |
| Contact, name | The name of the contact person of the research output. |
| Description | A description of the research output. |
| Keyword, term | Give a set of comma-separated list of keywords that best describe the research. |
| Keyword, vocabulary | If the keywords belong to a controlled vocabulary, give the name of the vocabulary here. Optional. |
| Keyword, vocabulary URL | If the keywords belong to a controlled vocabulary, give the URL of the vocabulary here. Optional. |
| Topic classification, Term | The contents of this field are to be taken from the AGROVOC controlled vocabulary. Choose a topic that best matches the research output from:  http://aims.fao.org/standards/agrovoc/functionalities/search |
| Topic classification, Vocabulary | The content of this field is *AGROVOC*. |
| Topic classification, Vocabulary URL | The content of this field is  *http://aims.fao.org/standards/agrovoc*. |
| Contributor | The person or organization responsible for collecting, managing or contributing to the source. Optional. |
| Grant information, Grant Agency | The content of this field is  *Inter-American Institute for Global Change Research* |
| Grant information, grant number | Provide the grant number associated with the dataset. For instance, CRN-III. |
| Distributor | The organization designated by the author to generate copies of the work. Optional. |
| Distribution date | The date the work was made available for distribution. Optional. |
| Depositor | The name of the person uploading the dataset. |
| Time period covered | The time period covered by the data. Optional. |
| Date of collection | The time period when the data were collected. Optional. |
| Kind of data | Select the data format from a controlled vocabulary by DDI Alliance:  <http://www.ddialliance.org/Specification/DDI-CV/KindOfDataFormat_1.0.html> |
| Series | Information about the dataset series. Optional. |
| Software | The name and version of the software used to produce the data. Optional. |
| Related material | A free description of any materials that may be related to the data. Optional. |
| Other references | References to supporting materials, if any. Optional. |
| Data sources | Relevant data sources that were used to create the dataset. Optional. |
| Origin of sources | For historical materials, information about the origin of the sources and the rules followed in establishing the sources. Optional. |
| Characteristic of sources noted | Assessment of the sources. Optional. |
| Documentation and access to sources. | Level of documentation of the original sources. Optional. |

* + Add the data by choosing “Select files to add”:



* + Select Save Dataset. After saving, you are directed back to the main menu.
  + To save additional metadata, select the dataset you just created and press “Add + Edit metadata”.



* + Scroll down to see additional metadata. It is possible to add geospatial, social sciences and humanities metadata, life sciences metadata and journal metadata.

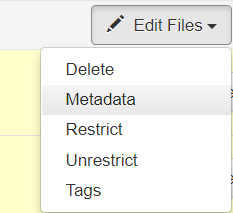
|  |  |
| --- | --- |
| **GEOSPATIAL METADATA** | |
| **Field** | **Description** |
| Other | Freetext on the geographic coverage of the data. Optional. |
| Geographic unit | The lowest level of the geographic data, e.g. village or county. Optional. |

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| **SOCIAL SCIENCE AND HUMANITIES METADATA** | |
| **Field** | **Description** |
| Unit of analysis | Basic unit of analysis, such as individuals, households or groups. Optional. |
| Universe | Description of the population covered by the data. Optional. |
| Time method | The time method or time dimension of data collection, e.g. panel or cross-sectional. Optional. |
| Data collector | Individual, agency or organization responsible for administering the questionnaire or interview or compiling the data. Optional. |
| Frequency | The frequency of the data collection, e.g. monthly. Optional. |
| Target sample size, formula | The formula used to determine target sample size. Optional. |
| Collection mode | Method used to collect the data, e.g. a face-to-face interview. Optional. |
| Type of research instrument | A type of data collection instrument used. E.g. a questionnaire or a programming script. Optional. |
| Characteristics of data collection situation | A description of the data collection situation. For instance, the duration of the interviews. Optional. |
| Actions to minimize losses | A summary of actions taken to minimize data loss. For instance, historical matching. Optional. |
| Weighting | The criteria for using weights if applicable. Optional. |
| Cleaning operations | Methods used to clean the data, e.g. consistency checking. Optional. |
| Response rate | Percentage of sample members who provided information. Optional. |

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| **LIFE SCIENCES METADATA** | |
| **Field** | **Description** |
| Other organism | If “other” was selected in the organism field, give a comma-separated list of the organisms of the dataset. The use of the NCBI taxonomy  (https://www.ncbi.nlm.nih.gov/taxonomy) is recommended. Optional. |
| Other measurement type | If “other” was selected in the measurement type field, give a comma-separated list of the measurement types of the dataset.  Terms from NCBO bioportal  (<https://bioportal.bioontology.org/>) are recommended. Optional. |
| Cell type | The name of the cell line from which the source or sample derives. Optional. |

# 3. Saving the file tags

* After saving the metadata, you are taken back to the main menu. Save tags to the files you uploaded by selecting the dataset.
* Select the files.
* Choose Edit Files - Metadata:



* Select Edit Tags.
* Select the most appropriate option from File Tags and for tabular data, Tabular Data Tags. A custom file tag can be created.
* Save changes.

# 4. Next steps

* When you have saved all the metadata, go to the dataset and submit it for review:



* The data curator of the IAI will do a general check on the metadata. Once the dataset has been checked it will be published in the Open Data Catalog.

# 5. Questions or comments?

Please do not hesitate to send us your questions or suggestions at iai@dir.iai.int.