

Institutional Contacts Resources

- [Monthly Borealis Dataverse Community Calls / Réunions mensuelles de la communauté Borealis](#)
- [Annual Reports](#)
- [Administrator Guide](#)
- [New Joiners Sessions / Séances pour les nouveaux membres](#)
- [Article / Dataset Double Blind Review Process in Dataverse](#)
- [Root Dataverse Setup / Multi-institutional Groups / Journals](#)
- [Known issues and common questions](#)
- [Single Sign-On \(Shibboleth\)](#)
- [Admin Groups](#)
- [Borealis system emails and list-serv](#)

Monthly Borealis Dataverse Community Calls / Réunions mensuelles de la communauté Borealis

Join us for our monthly Borealis Dataverse Community meeting. The Borealis team will share updates about development work, platform upgrades, and other projects. There will be lots of opportunities to ask questions and participate in discussions!

These meetings generally occur on the **last Thursday of every month at 1PM EST** (with exceptions*)

Contact borealisdata.ca/#contact for more information or to suggest agenda topics.

Next meetings / Prochaines rencontres :

- 2024-01-25
 - [Slides/Diapos](#) and/et [notes](#)
- 2024-02-29
- 2024-03-28
- 2024-04-25
- 2024-05-23*
- 2024-06-20*

Meeting slides and notes / Slides et notes

2023

- 2023-11-30
 - [Slides/Diapos](#) and/et [notes](#)
 - Topics include: Borealis updates and preliminary results from the Canadian Dataverse Admin Survey Working Group
- 2023-10-26
 - [Slides/Diapos](#) and/et [notes](#)
 - Topics include: Borealis updates and recently configured features, community question about default license, and upcoming workshops and events.
- 2023-09-21*
 - [Slides/Diapos](#) and/et [notes](#)
 - Topics include: Overview of the Borealis Dataverse Community, Borealis ongoing and new project updates, community question about re3data, and upcoming workshops and events.
- 2023-06-22
 - [Slides/Diapos](#) and/et [notes](#)
- 2023-05-25
 - [Slides/Diapos](#) and/et [notes](#)
- 2023-04-27
 - [Slides/Diapos](#) and/et [notes](#)
- 2023-03-30
 - [Slides/Diapos](#) and/et [notes](#)
- 2023-02-23
 - [Slides/Diapos](#) and/et [notes](#)
- 2023-01-26
 - [Slides/Diapos](#) and/et [notes](#)

2022

- 2022-11-24
 - [Slides/Diapos](#) and/et [notes](#)
- 2022-10-27
 - [Slides/Diapos](#) and/et [notes](#)
- 2022-09-29
 - [Slides/Diapos](#) and/et [notes](#)
- 2022-06-23
 - [Meeting slides](#) and [meeting notes](#)

- 2022-05-26
 - [Meeting slides](#) and [meeting notes](#)
- 2022-04-28
 - [Meeting slides](#) and [meeting notes](#)
- 2022-03-31
 - [Meeting slides](#) and [meeting notes](#)
- 2022-02-24
 - [Meeting slides](#) and [meeting notes](#)
- 2022-01-27
 - [Meeting slides](#) and [meeting notes](#)

2021

- 2021-11-25
 - [Meeting slides](#) and [meeting notes](#)
- 2021-10-28 (Cancelled)
 - [Meeting slides](#)
- 2021-09-23 ---Rescheduled from September 30
 - [Meeting slides](#) and [meeting notes](#)
- 2021-08-26
 - [Meeting slides](#) and [meeting notes](#)
- July meeting cancelled
- 2021-06-24
 - [Meeting slides](#) and [meeting notes](#)
- 2021-05-27
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included service updates and 2 community talks.
 - Community talks: Dataverse North, John Huck ([slides](#)); Dryad2Dataverse, Eugene Barsky and Paul Lesack ([slides](#))
- 2021-04-29
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included service updates, workflows for anonymous review in Dataverse, and Dataverse collections for scholarly journals.
 - Community talk: Isaac Pratt, McMaster Library ([slides](#))
- 2021-03-25
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included service updates, agreements for depositing in the root dataverse, and the [Tri-Agency Research Data Management Policy](#)
- 2021-02-25
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included service updates and admin groups.
 - Community Talk: CEG Dataverse Curation Guide Working Group ([slides](#)).
- 2021-01-28
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included service updates and CoreTrustSeal certification.

2020

- 2020-11-26
 - [Meeting slides](#) and [meeting notes](#)
 - Community talks: Kelly Stathis, Portage Network ([Slides](#)); Portage Curation Expert Group ([Slides](#))
- 2020-10-29
 - [Meeting slides](#) and [meeting notes](#)
- 2020-09-24
 - [Meeting slides](#) (SP updates) and [meeting notes](#)
 - Community talks: William Roy, Queen's University; Ève Paquette-Bigras, Université de Montréal ([Slides](#)); Alex Cooper, CEG Dataverse Curation Guide working group ([Slides](#))
- 2020-06-25
 - [Meeting slides](#) and [meeting notes](#)
- 2020-05-28
 - [Meeting slides](#) and [meeting notes](#)
- 2020-04-30
 - [Slides \(Shahira\)](#) and [meeting notes](#)
 - Invited guest John Huck from the Dataverse North Metadata group will discuss their latest [best practices guide](#) and provide some examples, and Shahira will introduce the [University of Victoria's Minimum Standards for Deposit in Scholars Portal Dataverse draft document](#)
- 2020-03-26
 - Drop-in questions and catch-up
- 2020-02-27
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included a presentation about the "Geodisy" CANARIE RDM project, and other SP Dataverse updates
- 2020-01-23
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included new subscribers and an update on the Canarie large-file upload project, with demos of the Data Capture Module and Globus integration

2019

- 2019-12-26 (**Cancelled**)
- 2019-11-28
 - [Meeting slides](#) and [meeting notes](#)

- Topics included upgrade to 4.17, Shibboleth and affiliation groups, CANARIE project update, Datacite
- 2019-10-31 (**Cancelled**)
- 2019-09-26
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included team updates, new subscribers, next upgrade details, CANARIE project update
- 2019-07-03
 - [Meeting slides](#)
 - Topics included permissions recap, new login plans and shibboleth pilot, updates from Dataverse community meeting, Portage updates, CANARIE project update + new blog, RDM summit planning.
- 2019-04-17
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included service agreement with BCI, Archivematica-Dataverse integration overview (with Grant Hurley), latest release testing, plans for institutional login, permissions update.
- 2019-02-21
 - [Meeting slides](#) and [meeting notes](#)
 - Topics included SP Dataverse support list procedures and local support, Institutional Dataverse permissions, plans for the group.

Annual Reports

- Borealis Annual Report, 2022 ([English](#) | [French](#))
- SP Dataverse Consortium, Fall Update Report, 2021 ([English](#) | [French](#))
- SP Dataverse Consortium Annual Report, 2020-2021 ([English](#) | [French](#))

Administrator Guide

The Borealis administrator guide is currently being translated. A draft version is shared below to support institutions in preparing their CoreTrustSeal (CTS) applications as part of the [Scholars Portal Dataverse / Borealis CTS Project](#). Please note we are accepting feedback via comments on the Google document. A PDF version is also prepared for review. Thank you to Alicia Cappello for her work on an initial draft and to Julie Shi for her assistance in drafting content and editing.

Document	Date	Google doc	PDF
Borealis Administrator Guide - Draft	2022-09-21	Borealis Administrator Guide Google doc (comments only)	Borealis Administrator Guide - Revised 2022-09-21.pdf

New Joiners Sessions / Séances pour les nouveaux membres

Date	Slides / Diapositives	Recording / Enregistrement
2022-09-28	English / Français	English / Français
2023-10-12	English / Français	English / Français

Article / Dataset Double Blind Review Process in Dataverse

Borealis now supports researchers with article or dataset double-blind review process (contact us for more information)

Researchers requiring anonymity to share a copy of their datasets for article review or dataset review as part of a double-blind review process are able to use an unpublished Dataverse collection in the Borealis root. Credentials for accessing this collection for deposit and Private URL sharing with reviewers is supported by Scholars Portal staff and Institutional Admins. It is recommended that each Institution wanting to support researchers with double blind review in Borealis, add information informing others at their institution about the availability of this workflow in Borealis and promotional materials. Further information will be added to the Borealis admin guide later this year (2022).

UNPUBLISHED Dataverse collection (<https://borealisdata.ca/dataverse/doubleblindreview>)

Root Dataverse Setup / Multi-institutional Groups / Journals

Borealis now supports setup of Dataverse collections in the root (must have an institutional sponsor). To setup, please contact us. A [standard template agreement](#) is provided for sharing (may be modified according to local practices).

Borealis team members can now setup Dataverse collections outside of an Institutional Dataverse collection for research groups and others that are in need of a separate promotional and/or multi-institutional space. It is required that a sponsoring institution e-mail Scholars Portal directly to request a setup, and the institution must be able to provide that group with training and onboarding support. An initial storage allocation of 100GB is provided, should more be required, this would be supported by the sponsoring institution. It is recommended that an agreement in writing be established between the sponsoring institution and the group, to ensure there is clarity around use of the collection and responsibilities should there be a need to transfer the data over to the library in the future. A template is available for these kind of agreements, which can be amended by institutions to suit their needs. Further information will be added to the Borealis guides as they are refreshed this year (Updated 2022).

Known issues and common questions

Issue	Status/Recommended Solution
Unable to upload a zip file in Borealis without being unzipped	Possible to double-zip the file to maintain as a zip or use a tar package.
I did not receive an email for approval to publish a dataset	Confirm that you are still an admin for the Dataverse collection where the data was published, particularly if it's in a sub-dataverse collection. Verify the permissions to ensure that users are "submitting datasets for review"
Error uploading file "Tabular ingest failed"	<p>For tabular file types (e.g., excel, csv, SPSS, etc), the Dataverse software tries to produce a non-proprietary format (tab-delimited) as part of its tabular ingest process. Users can still download the original format, in addition to this derivative file. More details can be found here: http://guides.dataverse.org/en/latest/user/tabulardataingest/ingestprocess.html</p> <p>The tabular ingest can fail for a number of reasons. Common issues include commas within the cells. If the data is a text string, you could wrap the text in quotation marks.</p> <p>However, you can also ignore the error. The file will still be downloadable by other users as is and users won't be able to see the caution symbol (viewable only by admins/curators/contributors of the dataset). Just so you know, if the software cannot convert it into a tab file, it won't be able to be used with the Data Explorer or the Data Curation tool, for example.</p>
Why isn't my institution in the drop down menu upon login/sign-up?	The drop-down menu is only for institutions who have registered for the Canadian Access Federation (CAF) Research & Scholarship entity profile, so their users can login using their institution's single sign-on. More details below.
Can users who are not affiliated with an institution create an account?	Anyone can sign up for an account in Borealis and will receive an affiliation of "OTHER." Those who are not affiliated with a participating institution need to request access to deposit by the collection admins or the collaborators who are affiliated with a participating institution.
How do I create file hierarchies for my dataset?	We found the easiest approach is to zip up the folder that contains the files within the hierarchy. The Dataverse software will unpack the zip and the directory structure will be stored in the metadata (you can view this by looking at the file name paths). Once you save the dataset, you can toggle between the flat file structure "table view" and the "tree view" to see the hierarchy. You can also edit the file metadata to make any changes to the file hierarchy.
I logged in with Shibboleth /single sign-on and no longer have the same permissions level.	In some cases, the email address that your initial account was created with and the email used by Shibboleth may be different - in this case, you may end up with 2 accounts in the system. To resolve this issue, contact the Scholars Portal team to merge these accounts.
Can I create a custom permissions role for my dataverse collection?	Custom roles can be created through the API by super users (the SP team). To create a custom role, contact the Scholars Portal team.
Can I change the year used in a dataset citation?	<p>The year in the dataset citation can be changed with the Dataverse API as long as it exists in the dataset's metadata record (e.g. as the date of distribution, or date of deposit). If you are not familiar with how to use the API, contact the Scholars Portal team to run the command. In your email, please include a link to the dataset and which metadata field you want to use for the citation date.</p> <p>You can find out more about the API command used on our Dataverse API page.</p>
What external sources are harvesting Borealis metadata records?	<ul style="list-style-type: none"> • FRDR • Google Dataset Search • Datacite (datasets published with DOIs only) • Web of Science Data Citation Index • Mendeley Data (DOIs only, via Datacite) • Harvard Dataverse • OpenAire (via FRDR)
Why is the Dataverse-support list-serv showing up in my junk mailbox or showing a spoofing warning on emails?	You may need to work with your local IT department to add the support-list to a list of allowed senders or to a "tenant spoofing allow list."

Single Sign-On (Shibboleth)

When a user goes to the "Log In" page for Borealis, they are presented with a list of institutions that they can login with. These institutions listed have implemented institutional accounts (also known as Shibboleth or single sign-on).

Borealis allows for Shibboleth (single-sign on) login through integration with the CAF Research and Scholarship (R&S) Entity Category. This category is required to use Shibboleth within Borealis - this is because the email, first and last name of user are required to be sent back to Borealis for a successful Shibboleth login, and these attributes are released within this category.

In order to use Shibboleth with Borealis at your institution, you will need to be registered with the Canadian Access Federation (CAF), be using Federated Identity Management with CAF, and then also be in the Research and Scholarship (R&S) Entity Category. There is no extra cost associated with the R&S category, but you will need to coordinate signing up for this with your institution's IT department. If you are not sure what your institution is using with CAF, you can review [this table on the CAF website](#).

Depending on the local setup at your institution, your IT group managing Shibboleth may need to release these attributes to <https://borealisdata.ca> once you have signed up for the R&S category. In some cases this is done automatically, but it varies based on local configuration.

You can find out more about the R&S entity category and how to join [on the Canarie website](#).

Admin Groups

Permissions for institutional dataverse collections are managed through a functionality called "Admin Groups" for some institutions. Individual users are added to these groups, and permissions are then given to the whole group. The Admin Group has been assigned as the main administrative access to your institutional Dataverse collection. Institutional administrators will only appear within this Admin Group and can be added/removed as needed. Individual administrator names will no longer appear in the institutional dataverse Permissions, existing datasets, or new datasets and dataverse collections.

However, administrative access to dataverse collections that existed before this Admin Group was set up will still display individual administrators in their Permissions. For these existing dataverse collections, manual intervention is needed in order to remove existing, individual administrative access and to add the Admin Group. Once this manual change is completed, it will never have to be done again.

Add Your Admin Group to Existing Sub-Dataverse Collections

Please refer to the instructions provided in the [Borealis User Guide](#), specifically the section of the guide titled [Advanced Permissions](#). However, instead of looking for an IP group, look for and select the Admin Group for your institutional Dataverse collection and assign the Admin role to it. If you don't see an Admin Group for your institution, contact the SP team to create one for you.

In addition to adding the Admin Group to the permissions, you'll also want to delete existing institutional administrators from the list of permissions. Click Remove Assigned Role in the rows for each individual administrator you want to remove from the sub-dataverse collection.

Once all users and groups have been updated, click Save Changes to close the window and save the updates you made.

Note: Adding and removing permissions will generate notification emails to all users whose permissions have changed.

Updating Your Admin Group

When you need to update your Admin Group, first make sure you are in your institutional Dataverse collection. Click Edit and select Groups. Click the Edit button in the row for your Admin Group. Add and remove group members as needed, then click Save Changes. Once the changes are saved, those changes will be reflected immediately in ALL datasets and sub-dataverses. No additional changes are required.

Note: Changes to groups will NOT generate notification emails.

Borealis system emails and list-serv

Upcoming changes to system-generated emails

After some consideration, the Borealis team moved to a new email (info at borealisdata dot ca) that sends notifications from the Borealis platform. This change will also improve automatic spam filtering of system-generated emails (e.g., notifications) by end-user email providers.

Upcoming changes to the support form workflow

This new support email will also receive all messages from any end users that use the general support form on the platform. The Borealis support team will forward relevant messages:

- to the appropriate institutional administrator(s) (when required)
- to the community listserv to support the ongoing practice of knowledge sharing, platform announcements, and community engagement (where appropriate)

Future listserv use

You are welcome to continue to use the listserv as a forum for discussion and knowledge sharing with the community of Borealis administrators, and as a way to get in touch with the Borealis team. The Borealis team will continue to use the listserv to share announcements and communicate with the community.

You can also continue to email the Borealis team directly if you wish to do so (borealisdata.ca/#contact)

What can you do?

We recommend working with your local institutional IT department:

- to add the new email to a list of allowed/safe senders and/or to a "tenant spoofing allow list."
- to configure your local email client to help to prevent messages being filtered to junk.

Responsibilities of schools

- Responding to end users in a timely manner is very important, please try to respond within 48 hours (2 business days).