JOURNAL DATA
ARCHIVE
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USER
MANUAL

Document version history:

Version	Date	Changes	Author
1.0	24.04.16	First version of the documentation completed	S. Vlaeminck
1.1	04.10.16	Adaption of screenshots	S. Vlaeminck
1.1.1	25.01.17	Minor textual revisions	S. Vlaeminck
1.2	02.02.17	Revision of all chapters, creation of chapter 4 (workflow for revisions)	S. Vlaeminck
1.2.1	17.10.17	Textual revisions and revision of chapter 2	S. Vlaeminck
1.2.2	13.11.17	Textual revisions and corrections	S. Vlaeminck
1.2.3	07.12.17	Adjustments in chapter 3 (Personal ID)	S. Vlaeminck
1.4	01.12.18	New field 'creator', removed fields 'add. information' & 'type of data'	S. Vlaeminck
1.5	06.06.19	New functionalities (file deletion, cancelation of data upload)	S. Vlaeminck

Content:

Dear Author,

First of all, many thanks for using our application! Within this document you will find useful notes for handling our application. In case of questions or ambiguities, this documentation is intended to support you in the process of uploading your replication files. In addition, we also provide guidance on creating metadata for these resources, which is an important task: By providing us with rich metadata, it is quite simple to add these datasets to your personal list of your scientific outputs. Your replication files can also be added to the scientific output of your institution.

We will successively expand the documentation and also add some short 'best-practice' examples for 'typical' submissions to economics journals.

Furthermore, we are continually enhancing the application. In particular, we aim to significantly reduce the efforts for describing each file with additional metadata.

If there are additional questions, which are not covered by this documentation, please feel free to contact the product manager of the ZBW Journal Data Archive, Mr. Sven Vlaeminck (E-Mail: journaldata@zbw.eu; Phone: +49(0)40-428 344 15).

Many thanks in advance!

1. Your registration as an author

Every upload to the ZBW Journal Data Archive starts with a registration e-mail, triggered by the editorial office of your journal. This automatically generated e-mail (sent by journaldata@zbw.eu) also contains a link to the application.
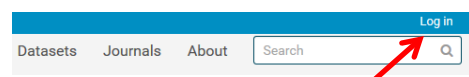
The hyperlink takes you to the website of the Journal Data Archive, where you will be asked to set a password for your account.
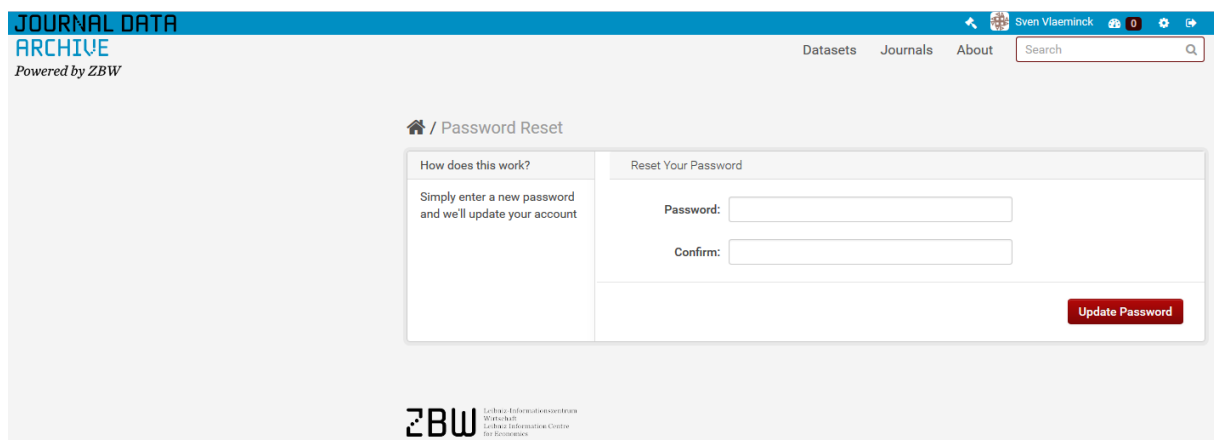
After setting your password, you receive a confirmation message:

Now, everything is prepared to log in. Please click on the "Login"-button in the upper right corner of your screen.

Important: **Please use *exactly* the username you received with your initial invitation e-mail (e.g. *your.name-8080*). Otherwise, your login will fail.**

Our application works best with the Firefox or with the Google Chrome browser. When using other browsers (especially when they are out-of-date), it is possible that not all functionalities are working in the intended way.
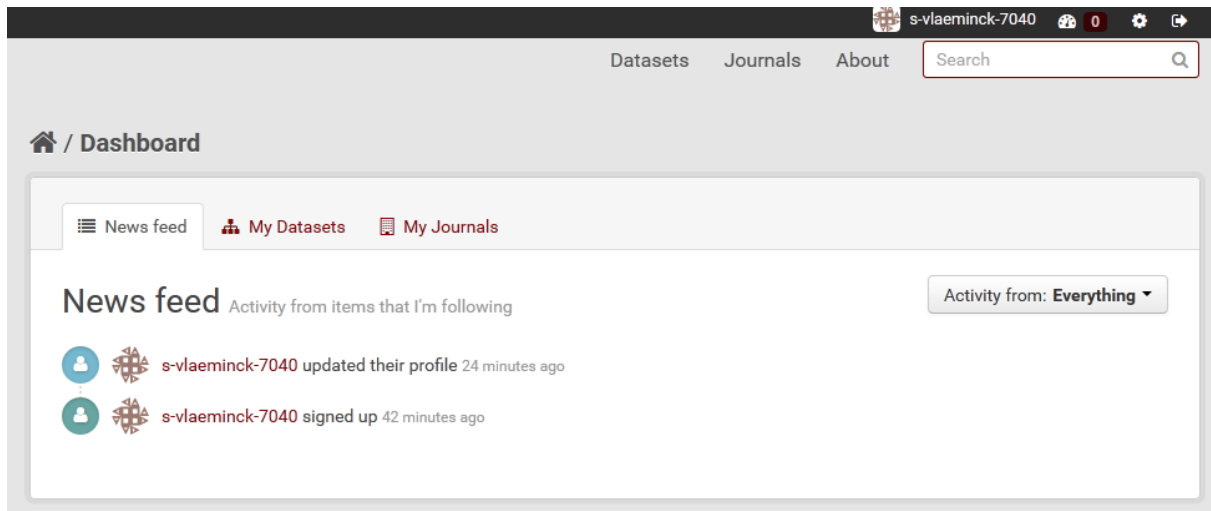
After successfully logging in, you are redirected to your personal dashboard. Within the dashboard screen, your recent activities are listed (*News feed*) and an overview of all your submissions is available (*My Datasets*). *My Journals* shows the journal(s) for which you are registered as an author.

2. Starting the upload-process

Now you are ready to submit your data. First of all, please click on "*My Datasets*" followed by a click on the "*Add Dataset*" button.

/ Dashboard

☰ News feed   ⛓ **My Datasets**   📓 My Journals

➕ Add Dataset

You haven't created any datasets. Create one now?
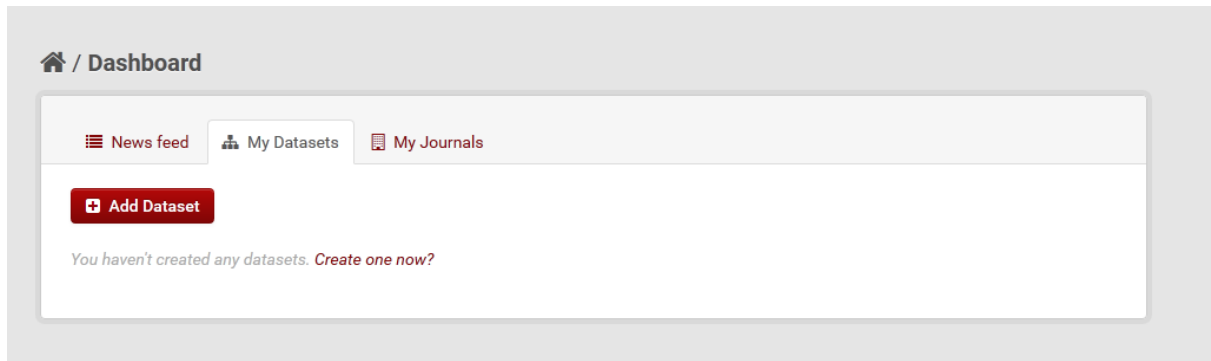
The screen below opens:

① Create dataset   ② Add data

Title:*	eg. A descriptive title.
	URL: 134.245.93.94/dataset/<dataset> [Edit]
Description:	Abstract or similiar
	You can use Markdown formatting here
Publication Year:*	eg. 2011
Version:*	1
Article Submission ID:	eg. 2016-12346
JELs:	Start typing and select JELs
Keywords:	eg. economy, mental health, government

Authors

Author:*	
Last Name:*	
First Name:	
Affiliation:	Your institution
Professional URL:	http://www...
Personal ID:	ORCID, Scopus, GND or Web of Sc

[Add Author]

On this screen, we would like you to provide some information about the **entirety** of your submission, <u>not</u> single parts or files of the submission. For instance, you might describe all files you submit and their purpose. Below we explain each field in detail:

Title: The title of your submission could be the title of your article, supplemented by the addition '*(replication data)*'. By adding the title of your paper and '*(replication data)*' the findability of your data by search engines is facilitated. In addition, it is much easier to interlink your paper with the replication files in our data archive. Please note: This is a **mandatory field**.

URL: You can leave the field as it is – except when you receive a failure notice. In case the title of your submission exceeds 100 characters, the URL must be manually shortened (-> *'Edit'*).

Description: Here, you are asked to provide would-be replicators and interested readers with some

information on the **entirety** of your data submission (e.g. purpose of each file etc.). If you do not want or are not able to provide such information, we recommend pasting the abstract of your article into the description field. Thereby users of the Journal Data Archive receive an impression of your research topic, of the aims and objectives of your paper and of the methods and the type of data associated with your research article.

Publication year: Please provide us with the publication year of your article. If you do not know the year, yet, please choose the current year. Please note: This is a *mandatory field.*

Version: By default, the version number is '1'. You should only change the version number if you submit a revised version of your replication files. In this case please choose an appropriate new version number (e.g. '1.1' for minor revisions or '2' for major revisions).

Article Submission ID: Some journals recommend specifying your article submission ID within this field. If your journal has assigned you such an ID, please state it here.

Keywords: Please provide some keywords that fit your research article and/or the data you would like to submit. Most often, you will simply reuse the keywords of your article. The easiest way is to type in all terms (one after another), but each one separated by a comma.

Author: Please list all authors involved in writing the paper. Please specify the first and the last name(s) of all authors (you can expand the list of authors by clicking on the "*add author*" button). In case of a middle name, please add the middle name to the field '*first name'*. Please note: This is a *mandatory field.*

To support correct identification of authors' names we have implemented a so called lookup-service: you start to type in the last name of an author and receive a list of known economists from Germany and abroad (not comprehensive). If an author's name is available in the list, please choose the correct person to autocomplete all metadata fields for this author. The **personal-ID** is also added automatically and displayed (based on the GND – the German library authority file). Please do not alter the personal-ID in this case.

Affiliation: Please state the affiliation you are working for (respectively the affiliation you mentioned in your paper). A lookup-service for the affiliations is also available and works as described above for the identification of authors.

Professional URL: In this field, you are invited to state your personal or institutional website. Thereby, other users and visitors of your data submission can directly inform themselves about you and your fields of research. Please note: The URL has to start with a 'http://' (e.g. http://www.myaffiliation.de/author)

Personal ID: If you have selected an author's name via the lookup-service, there is no need to alter the information displayed within this particular 'ID-type' field.

Only, if you want to provide another ID (e.g. your ORCID-ID, your RePEc-ID, your Scopus-ID or your ID of the Web of Science), you should edit this field.

Please note that you also have to change the vocabulary ('type'), when you provide a different ID. For instance, when entering your RePEc-ID please also choose 'RePEc' as 'type' of your personal ID from the list.

After completing this screen, the next step is to upload the single files to the Data Archive by clicking on the button on the bottom right corner ("Next: Add Data").

3. Submitting replication files

In the next step you are invited to submit so called 'resources' to the ZBW Journal Data Archive.

At the top of your screen you can choose which 'resource' to register (at a later stage, identical or additional resources may be uploaded to the data archive). Among these resources you can choose between 'Data', 'Text, Documentation, PDF', 'Code' and 'other'.

Please choose the appropriate resource for each file, because the process of file submission (and description) depends on the appropriate selection of a resource. Please note that every dataset and all other files must be submitted in a separate process (no zip-files, please)!

3.1 Submitting datasets

The availability of datasets and the accurate description of these datasets with metadata are an important cornerstone of reproducible economic research. Hence, there are a few more metadata fields to fill in compared to other resources.

Please consult the data policy of your respective journal to clarify which data, files and other materials have to be submitted to the data archive to satisfy the journal's data policy.

The metadata fields listed below are available when you upload a dataset.

File: When you click on the "*Upload"*-button, a pop-up window appears in which you have to select the correct file to upload.

Important: **Please ensure that you have the rights to submit the files you would like to upload to the application**. **Normally, datasets which include individual-related data or microdata are prohibited from sharing! Purchased datasets are also often prohibited from sharing in public data repositories. If you are unsure, please contact the data protection officer at your institution.**

Link: A link to a so called landing page of a dataset should only be provided if the dataset used for your research is confidential or cannot be submitted to the data archive due to legal reasons. In such cases you can still provide a hyperlink to these datasets or to a website that describes the data and the possibilities to access the data.[1]

Name: The name of the file will be automatically taken over from the filename. You can edit the filename, if you want to do so.

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[1] For instance, for version 29 of the German Socio-Economic Panel (SOEP) the correct link is http://www.diw.de/en/diw_01.c.431030.en/soep_v29.html. An even better practice is to provide the DOI of the dataset: http://dx.doi.org/10.5684/soep.v29.

Description: You are free to submit additional information on the dataset within this field. For instance, you can describe the type of information that is available in the dataset or the method used to collect the data. The software (and its version) to open the dataset is of particular interest.

Format: Please provide the file-format in capital letters (e.g. XLS, DTA, SAV, CSV…). For some of these data formats a preview is enabled by this mechanism.

Creator: You only need to fill in this field when the authors are not the creators of the resource. For instance, when you reuse a publicly available dataset, please provide the information on the creator (in this case probably an institution). You may provide the names of persons and/or institutions. Please note that *institution* is not necessarily the institution of an author but the creator/producer of the resource.

Publication year: The default displayed is the publication year you entered at the first screen. If you would like to change it (for instance because you know that the dataset has been published earlier already), you can do so. Please note: This is a ***mandatory field.***

Availability: By default the availability is 'Free Download'. You should only change this value in case you are not able/not allowed to upload the dataset used for your calculations ***AND*** when you provided a link to the dataset, instead. In this case, please choose the appropriate value (for datasets available in research data centres only, choose 'onsite only'). Please note: This is a ***mandatory field.***

Version: The default version number is '1'. You should only change the version number, if you submit a revised version of your dataset. In this case, please choose an appropriate new version number (e.g. '1.1' for minor revisions or '2' for major revisions).

Geographic Coverage: Please state which geographical areas are covered by your dataset. Just start typing and choose the appropriate state(s) from the list. In addition you are free to provide more information on specific geographical region(s) within the free text field (e.g. North America; Eurozone, Germany, EU Member States, Berlin,…)

Sampled Universe: Please specify the sample on which your dataset relies (e.g. GDP of all states within the Eurozone, Companies in China, foreign students in Canada,…).

Temporal Coverage: Please choose which time period is covered by your dataset. You can choose the calendar widget to provide this information. Please note: Format has to be DD.MM.YYYY. Alternatively or additionally you may provide some information in the free text field.

Number of Units: Please specify the number of units of your dataset. Such units can be persons, households, organisations, states, regions…please provide a whole number.

Type of Units: You can choose the appropriate type of unit from a (controlled) list (e.g. Household, Organisation,…).

Number of Variables: Please specify the number of variables of the dataset (whole numbers, only).

Caution! By clicking on the "Finish"-button, you complete your submission, while choosing "*Save & add another*" offers the possibility to submit additional files to the data archive.

3.2 Submitting syntax/program code

If you would like to submit syntax or program code, please choose the resource '*Code*' at the top of your screen. A screen with just a few metadata fields opens.

First of all, please upload the appropriate file containing the program code file by clicking on the "*Upload*" button. When you click on the *"Upload"*-button, a pop-up window appears in which you have to select the correct file to upload.

Name: The name of the file will be automatically taken over from the filename. You can edit the name of the file within this field, if you want to do so.

Description: Within this metadata field, you can provide some additional information on the program code/syntax. For instance, you may state the software's name and version (e.g. STATA 13) to clarify which application renders the file.

Format: Please provide the file format in capital letters (e.g. DO, SPS, TXT…). For some file formats, a preview of the data is enabled by this mechanism.

Creator: You only need to fill in this field when the authors are not the creators of the resource. You may provide the names of persons and/or institutions. Please note that *institution* is not necessarily the institution of an author but the creator/producer of the resource.

Publication year: The default displayed is the publication year you entered at the first screen. If you would like to change it (for instance because you published the program code earlier already), you can do so. Please note: **This is a mandatory field.**

Version: The default version number is '1'. You should only change the version number if you submit a revised version of your program code. In this case, please choose an appropriate new version number (e.g. '1.1' for minor revisions or '2' for major revisions).

Caution! By clicking on the "*Finish"-*button you complete your submission, while choosing "*Save & add another"* offers the possibility to submit additional replication files to the data archive.

3.3 Submitting text files (documentation, instructions, codebooks, readme-file, questionnaires,…)

Often, text files are important parts of the data's documentation. In particular this applies to the typical 'readme-file' in which authors normally give a summary on how to use the files in a data archive to achieve the results claimed in a research paper.

Again, when you click on the "*Upload*"-button, a pop-up screen appears. Please select the appropriate text file to be uploaded to the data archive.

Name: The name of the file will be automatically taken over from the filename. You can edit the name of the file within this field, if you want to do so.

Description: Within this field you can provide readers with additional information on your text file. For instance, you can mention the type of the text file: Is it part of the documentation? Is it a codebook or a questionnaire? Or is it the readme-file that lists all replication files and its purposes for replication attempts? In either case it is useful to mention the purpose of the file in the context of your research article.

Format: Please provide the file-format in capital letters (e.g. TXT, PDF, DOC…). For some data formats a preview of the data is enabled by this mechanism.

Creator: You only need to fill in this field when the authors are not the creators of the resource. You may provide the names of persons and/or institutions. Please note that *institution* is not necessarily the institution of an author but the creator/producer of the resource.

Publication year: The default displayed is the publication year you entered at the first screen. If you would like to change it (for instance because a documentation has already been published earlier), you can do so. Please note: **This is a mandatory field.**

Caution! By clicking on the "*Finish*"-button you complete your submission, while choosing "*Save & add another*" offers the possibility to submit additional files to the data archive.

3.4 Submitting other files

If you would like to submit some more files to the data archive, but none of the above mentioned categories are suitable to describe these files, you may also choose the category 'other' for these resources. Examples for such files cover screenshots, GIS-files or other graphic formats, but also audio or video files.

For these files the same upload procedure applies: When you click on the "*Upload*"-button, a pop-up window appears. Within this window you have to select the file that should be uploaded to the data archive.

Name: The file's name will be automatically taken over. Nevertheless, you can edit the file's name within this field, if you want to do so.

Description: Within this field, you can provide readers with additional information on this particular file. In either case it is useful to mention the purpose of the file.

Creator: You only need to fill in this field when the authors are not the creators of the resource. You may provide the names of persons and/or institutions. Please note that *institution* is not necessarily the institution of an author but the creator/producer of the resource.

Caution! By clicking on the "*Finish*"-button you complete your submission, while choosing "*Save & add another*" offers the possibility to submit additional files to the data archive.

Please do not save .zip /.rar or .bz-files in the data archive. Instead, please unpack these container files and submit each file in a separate process to the archive!

3.5 Cancelling the upload of a resource/file

In cases you accidently clicked on *Save & add another* but do not want to add another file or resource, you can simply click the *Cancel* Button on the left bottom of the screen. But caution: Any files uploaded or information entered on the current screen will not be added to the JDA!
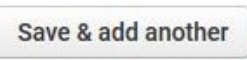

3.6 Modifying your submission (prior to or after review)
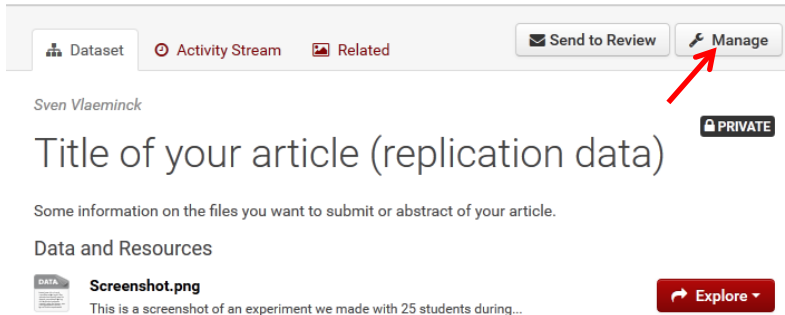
It might happen that you accidentally click on the "finish"-button before you have completed the whole submission. In such cases (or if you would simply like to submit additional files, change the information within a metadata field, or reorder the submitted files), you may click on the "*Manage*"-Button in the upper right corner of your screen.
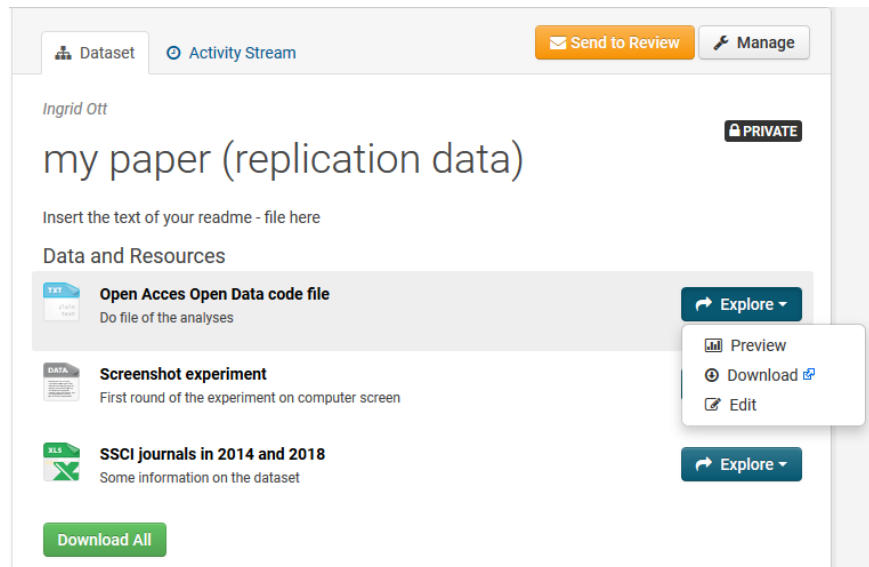
The screen now opening offers several possibilities:
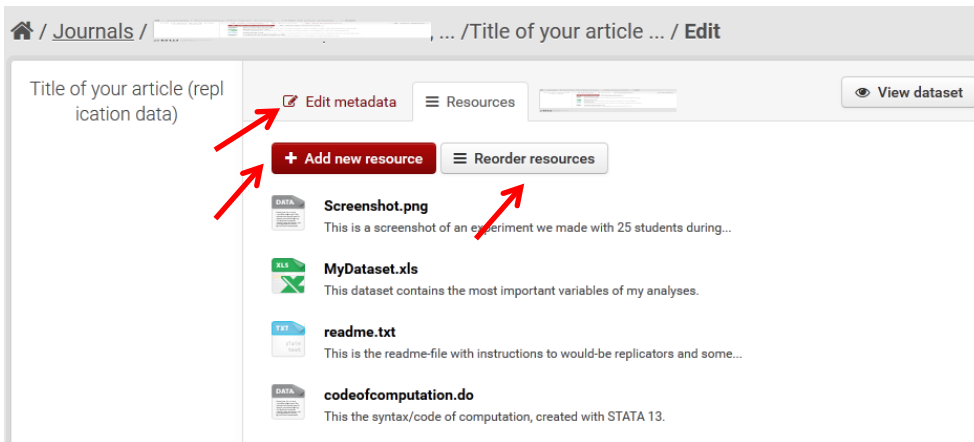
1) You may reorder resources already submitted
2) You may add new resources
3) You may edit the metadata of resources already uploaded
4) You may delete a resource (for instance, if you uploaded a wrong file)
5) You may edit the resources of the entire submission

3.6.1 Deleting files or resources

In cases you accidently uploaded a wrong file into the JDA, you can delete this file. If you only attached an incorrect file, but all the other information entered is correct and should be kept, you might think about modifying this resource (-> chapter 3.6.4 and below) to avoid additional work for entering information you already provided.

If you really want to delete a file/resource, you can do it by going to the landing page of your data submission (screenshot on the left side). Please choose the file you would like to delete. Click on *Explore* and choose *Edit*.

The now opening screen offers the possibility to update or to delete the file uploaded and the corresponding metadata. If you would like to replace the file you can do so by clicking on the button with the red cross and simply upload another file (see chapter 3 for details).

Additional, you can update the metadata already entered. When you are finished with the modifications, you can complete the upload to the research by clicking on „*Update Resource*".

If you want to delete the file and the corresponding metadata and remove it from the application, please click on the „*Delete"* button on the left bottom of the screen.

3.6.2 Reordering resources
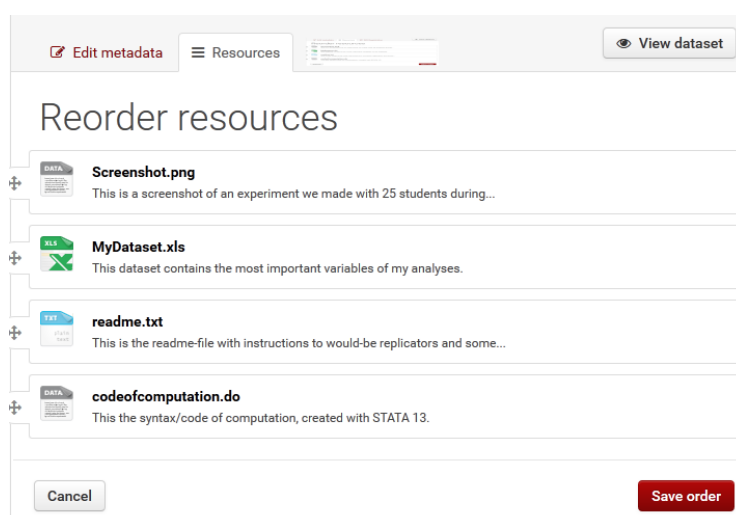
Sometimes you might want to change the order of the files displayed on the screen (the order is determined by the sequence of uploads).

If you would like to reorder the resources of your submission, please click on the "*Reorder Resources"*-button.

A new screen opens in which you can arrange the order of your files by clicking on a particular resource

and moving it to the correct place.

3.6.3 Adding additional resources to the data archive

You can add a new resource ('*Data*', '*Text, Documentation, PDF*', '*Code*' or '*other*') by clicking on the "*Add new resource*" button (screenshot at the top of this page). Subsequently the process for uploading these resources begins as usual (described in chapter 3).

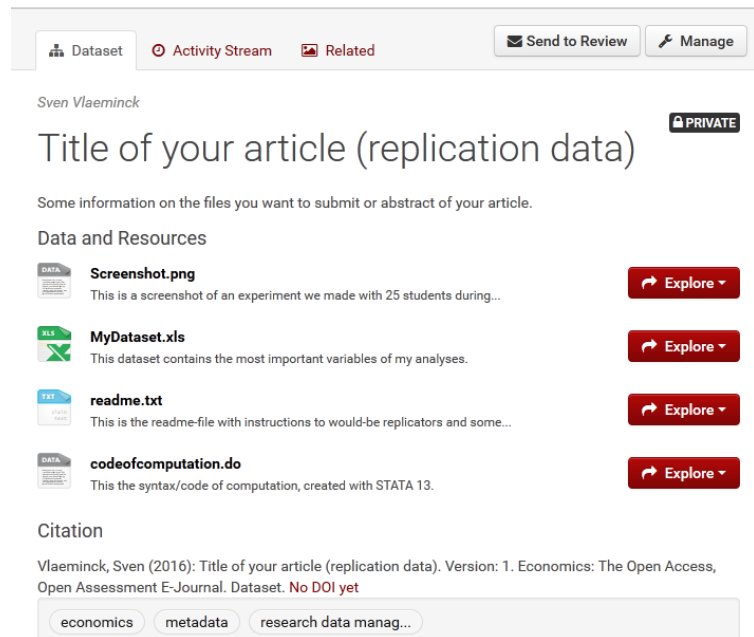### 3.6.4 Modifying metadata of uploaded resources
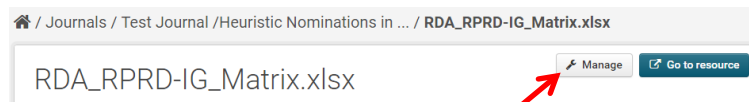
If you would like to modify the metadata of a resource already submitted to the journal data archive, please follow the instructions described in chapter 3 (-> '*Manage*' -> '*Resources*'). Afterwards, please click on the resource for which you would like to modify the metadata. The screen with some information on the resource opens. Next, click on "*Manage*" – the metadata fields again become visible and editable. Now you are free to update the metadata for this particular resource (see chapters 3.1 to 3.4). You terminate the process of revising the metadata of a resource by clicking on the "*Update Resource*" button.

3.6.5 Modifying the metadata of the first screen

The metadata of the entirety of your submission can also be altered. To modify the information of these fields, please click on "*Edit metadata*" at the top left corner of the screen shown in chapter 3.5. Subsequently the metadata fields of the entire submission (displayed in chapter 3) open again and you can update the information.

3.7 Completing your submission

If all files necessary have been uploaded to the data archive you can terminate the submission by clicking on the "*Finish"*-Button. Subsequently a new screen opens. The screen displays all submitted replication files and also parts of the metadata you provided to the data archive. This screen also serves as the preview of your submission.

Again, please carefully examine the information you provided. When you are sure that the submitted files and information are correct and sufficient, you can terminate the whole upload process by clicking on the "*Send to Review"* button.
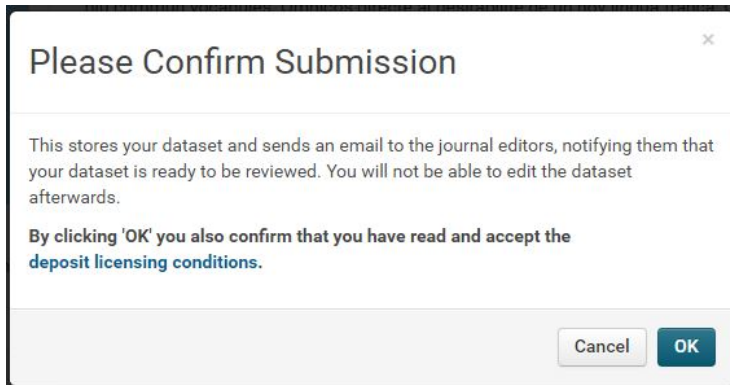
Hereupon a new dialogue box opens. Now you have to confirm a final step: By clicking on "OK" you confirm that you have read and agree to our terms of use and our deposit licensing conditions.

After consenting to our terms of use, the editor / the editorial office of the journal will be notified by the application that your submission is ready to be reviewed.


The information above will be displayed. In addition your submission obtains the mark-up that the replication files are under 🔒 REVIEW review now.

From this point on, further modifications are not permitted till the end of the review process.
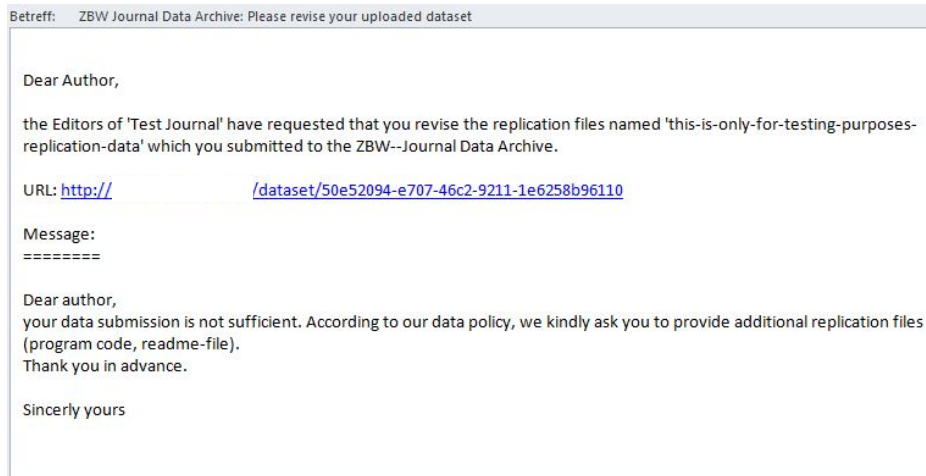
3.8 Log off

After completing your submission, you terminate the session by ticking the "log out" button at the top right corner of the screen. If these buttons are not visible, please ensure to use the Firefox or Chrome browser.
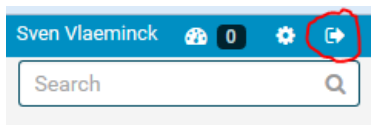
4. Reworking your submission after review

When you receive an e-mail from the system (an example is shown below) in which the editorial office recommends to modify some of your submitted files and/or metadata, the procedure is identical to the approach shown in chapter 3.6.

Please follow the link displayed in the e-mail and log in. Subsequently, you can edit the data and metadata you submitted to the data archive. A new label ('*Re-Author*') is shown.

Betreff: ZBW Journal Data Archive: Please revise your uploaded dataset

Dear Author,

the Editors of 'Test Journal' have requested that you revise the replication files named 'this-is-only-for-testing-purposes-replication-data' which you submitted to the ZBW--Journal Data Archive.

URL: http://   /dataset/50e52094-e707-46c2-9211-1e6258b96110

Message:
========

Dear author,
your data submission is not sufficient. According to our data policy, we kindly ask you to provide additional replication files (program code, readme-file).
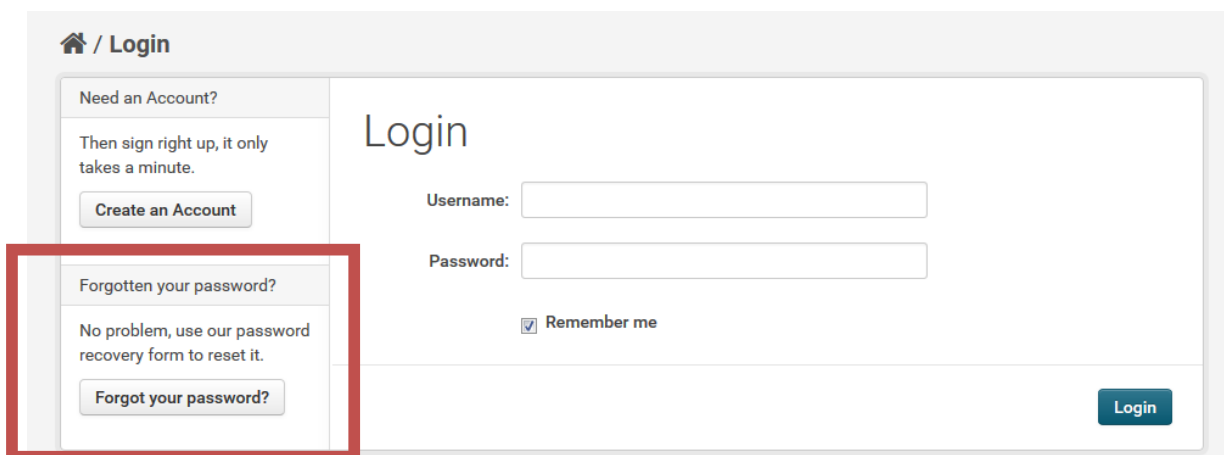Thank you in advance.

Sincerly yours

5. Restoring your account details

We all have many accounts for a multitude of portals und services – and of course, it is possible that someone does not remember his or her account details.

5.1 Restoring your password

It's quite easy to restore your password. Simply click on the "Forgotten your password" button at the left bottom of the login-screen.

5.2 Restoring your username

To restore your username you may first have a look at the list of registered users by typing http://journaldata.zbw.eu/journals/members/ABBREVATION-OF-YOUR-JOURNAL, e.g. http://journaldata.zbw.eu/journals/members/jbnst

If the list of registered users does not help you to determine your user name or your account details, please contact us by e-mail: journaldata@zbw.eu. Due to reasons of privacy protection we are unable to provide the e-mail addresses of our users online.

Contact and support

If you should experience problems or difficulties while working with our application which are not covered by this manual, please feel free to contact us by mail or phone. We will gladly assist you in finalising your data submission.

 Also, we are grateful for comments and hints in cases you feel that a description within this manual is not sufficient or even incorrect.

Product management:
Sven Vlaeminck
ZBW-Leibniz Information Centre for Economics
Neuer Jungfernstieg 21
D-20354 Hamburg/Germany
[e]: journaldata@zbw.eu
[t]: +49-40-42834-415