# Czech Social Science Data Archive Preservation Policy

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Czech Social Science Data Archive
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# 1. Preservation Policy

The following document describes the work activities of the information preservation system of the Czech Social Science Data Archive (hereinafter as CSDA) and is structured along the process of data preservation, from the pre-ingest stage to the stage of providing archive users with access to the data. The different stages of the preservation process are in line with the Open Archival Information System (OAIS)[1], and each activity can be assigned to a given OAIS functions[2].

## 1.1. Overview of job positions in the management of the CSDA preservation system

The following job positions are associated with responsibility for given functions. Activities are performed in cooperation with other CSDA workers, in line with existing distribution of work, including non-managerial staff. The overview does not include managerial positions covering CSDA functions outside the information preservation system. Detailed job descriptions with respect to OAIS functions are described in an internal document (*Zavedení principů OAIS v činnosti Českého sociálněvědního datového archivu*, in Czech) which is available to all CSDA staff on a shared drive volume at X:\datarchiv\OAIS.

The work process at CSDA is implemented within the following positions:

### 1.1.1. Archive Director

The Archive Director is responsible for managing the preservation process.

### 1.1.2. Acquisitions & Ingest Administrator

The Acquisitions & Ingest Administrator manages the pre-ingest stage, Ingest, and the Audit Submission and Negotiate Agreement Administration. He/she monitors depositors' requirements.

### 1.1.3. System Administrator

The System Administrator manages all Data Management and Archival repository functions, the Technology monitoring function from Preservation Planning, and System Configuration Management from Administration.

### 1.1.4. Access Coordinator

The Access Coordinator manages Access and user-related functions of Administration (Activation Requests and Customer Service). He/she monitors users' requests.

## 1.2. Shared & ad hoc activities

Some functions are fulfilled on an ad hoc basis, typically by drafting and regularly (not continuously) updating documents. They include the following:

- Administration – Archival Information Update
- Administration – Standards and Policies

1 http://public.ccsds.org/publications/archive/650x0m2.pdf

2 For more details, see internal document *"Zavedení principů OAIS v činnosti Českého sociálněvědního datového archivu" (in Czech).*

- Administration – Control of physical access to the archive
- Preservation Planning – Develop SIP/AIP/DIP Packaging Designs & Migration Plans,
- Preservation Planning – Develop Preservation Strategies and Standards.

# 2. The Acquisitions & Ingest Administrator

## 2.1. Scope of responsibility

The Acquisitions & Ingest Administrator is responsible for the following:

(a) Pre-ingest stages (not specified in the OAIS), from identifying potential depositors to negotiating submission agreements with them. In collaboration with the Archive Director, he/she plans acquisition activities, submits a plan to the Director for approval, delegates pre-ingest responsibilities, monitors the course of activities and fulfilment of the plan, evaluates the results, and recommends activities to facilitate pre-ingest efforts under CSDA projects.

(b) The Receive Submission function involves the receipt of data and metadata in the Submission Information Package (SIP), submission screening (primary quality assurance), and correction and resubmission in collaboration with the depositor. The Administrator is responsible for transforming the submission into AIP, sending the SIP and the AIP to audit, processing the audit report, generating descriptive information, and transferring the AIP to Archival Storage.

(c) Coordinating Updates of data and metadata

More particularly, the following activities are involved:

- planning the search for data,
- monitoring research projects,
- contacting potential depositors and negotiating submission agreements with them,
- concluding submission agreements,
- responding to submission requests,
- receiving submissions,
- primary quality assurance,
- AIP generation,
- collaboration on SIP and AIP audit, reconciliation of audit reports,
- generating descriptive information, and transferring AIP to Archival Storage,
- coordinating updates.

## 2.2. Planning the search for data for preservation

The Acquisitions & Ingest Administrator drafts a plan for contacting data producers and gathering data with view to (1) requesting data from studies for preservation and/or (2) obtaining information about available datasets for the purposes of preserving them and making them available and/or (3) starting a data ingest cooperation. The plan includes the following, in particular:

- definition of areas and/or list of institutions on which the data search shall focus,
- delegation of responsibilities for the different areas and/or institutions between CSDA staff,
- a time schedule,
- a specific procedure.

In order to draft the plan, the Administrator may request the monitoring of research projects. He/she also uses the results of literature reviews, surveys and analyses of data sources conducted by CSDA researchers. The draft plan is tabled for discussion in the Archive in order to identify available capacities and coordinate with other CSDA efforts. The CSDA Director

approves the plan and delegates responsibilities for its implementation. The Administrator transfers the plan to the System Administrator for filing in the System Configuration Archive.

The Acquisitions & Ingest Administrator monitors the implementation of the plan. If necessary or directly requested by the CSDA Director, he/she updates the plan and transfers the update to the System Administrator for filing in the System Configuration Archive. The CSDA Director approves any major revisions of the plan and delegates responsibilities for their implementation.

## 2.3. Contacting producers and starting cooperation

The workers responsible for implementing the plan contact data producers as specified. Whenever possible, they simultaneously raise awareness of data sharing and data services, including the specific services offered by the CSDA (e.g., organization of presentations and seminars and consultations).

Whenever files suitable for making available by the Archive are found, the workers responsible for implementing the plan secure basic information about the materials to be preserved in line with the applicable SIP template which describes acceptable types of data and data formats as well as the required information about the research study. The following counts as required information, in particular:

- title of project and/or database,
- identification of depositor's contact person,
- institutional setting (Principal Investigator, institution, likely copyright holder),
- basic information about the project (topic, orientation, method),
- basic information about the database (type of data, anonymity, size – number of files, formats, media),
- basic information about documentation (availability, state, formats).

If the negotiation with the data producer is not concluded successfully, the worker communicating with the potential depositor reports to the Acquisitions & Ingest Administrator. Whenever suitable files are found and basic information is identified, he/she adds a new record for each file in the SIP Database, enter the information obtained and report to the Acquisitions & Ingest Administrator.

## 2.4. Concluding submission agreements

After assessing the information about the materials to be preserved relayed in the submission request (see below) or obtained in the process of contacting data producers, the Acquisitions & Ingest Administrator initiates the drafting of a submission agreement, requests additional information or recommends postponing or rejecting the submission to the CSDA Director. The assessment may be based on consultations with other CSDA workers or external experts, while any expenditure is approved in advance by the CSDA Director.

The agreement is negotiated primarily by the worker responsible for responding to the submission request. The negotiation can be delegated to another worker by the Acquisitions & Ingest Administrator, e.g. for reasons of capacity or organization.

The responsible person:

(1) discusses with the depositor the classification of the materials to be deposited by level of access rights, any specific requirements related to access and the data, and the wording of the agreement,

(2) drafts the submission agreement based on the information obtained and using a template,

(3) forwards the draft agreement to the Acquisitions & Ingest Administrator and the CSDA Director for approval,

(4) in collaboration with the CSDA Director, proposes the draft agreement to the depositor and Institute of Sociology (IS) management, and facilitates the exchange and reconciliation of comments,

(5) assisted by the CSDA Director, makes sure that the agreement is signed by IS Director in three copies and subsequently by the authorized representative of the depositor.

The responsible person lodges at least one copy with the depositor, passes one to the IS Secretariat for archiving, and passes the third one to the System Administrator for filing in the Document Archive.

A report on the conclusion of the agreement is submitted to the Acquisitions & Ingest Administrator and recorded in the SIP Database.

## 2.5. Responding to submission requests

The Administrator receives submission requests from User Request Administration, continuously checks the User Request Database for submission requests, and delegates responsibilities for negotiating submissions to qualified CSDA workers including him/herself.

The submission request is delegated immediately, no later than 3 working days after receipt by the Archive. The responsible worker makes a record in the SIP Database.

No later than 5 working days after receipt of the submission request by the Archive, the responsible worker contacts the applicant with brief, basic information about the submission procedure, and requests any additional information or details that are required for basic identification of the materials to be preserved. The required items are listed below. The above rules of CSDA-initiated negotiation shall apply *mutatis mutandis*.

## 2.6. Receiving submissions

This function ensures the receipt of files to be preserved from depositors. It is initiated by the Acquisitions & Ingest Administrator, or a worker designated by him/her. If this is a different worker than the one who negotiated data submission, the Administrator also provides him/her with all necessary information, including unique data IDs and the submission agreement concluded between the Archive (or, more specifically, the IS) and the depositor. The agreement specifies the terms of submission and the extent of the data submitted. The Submission Information Package (SIP) is received, the receipt confirmed to the depositor (including Packaging Information) and recorded in the SIP Database. The data itself are archived in the SIP Database under the given ID. Non-electronic data are deposited in the Analogous Dataset-Related Materials Archive and must be referred to in the SIP itself.

## 2.7. Acceptable data formats

The Archive processes data for the purposes of long-term preservation, securing it against damage and making it available to secondary users under agreed conditions. In order to fulfil these functions, the data must be preserved in a way that makes it useful without the assistance of the experts who produced it. This purpose directs the definition of acceptable data formats. In principle, the Archive can accept data in any format if it can be converted to standard formats in which Archival Information Packages (AIPs) are preserved. CSDA workers responsible for negotiating data submission ensure that the data is ingested in a form that ensures their integrity, allows long-term preservation in the original SIP format, and is

convertible to formats in which AIPs are preserved in internal storage. Ideally, both the SIP and the AIP would be prepared in the same format in which they are preserved in the Archive.

If file format conversion is necessary, then this should be preferably done by the primary researcher who is acquainted with the content and form of the data. If the producers are unable or refuse to convert their own data, the conversion is performed by the responsible CSDA workers in way that minimizes loss of information (e.g., when definitions of missing values are deleted in the course of file format conversion between different quantitative data analysis programmes).

The Czech Social Science Data Archive prefers data in the formats listed in Table below. Selected acceptable formats are also listed.

Table: List of preferred and acceptable data formats

| Type of data | Preferred data formats | Other acceptable data formats |
|---|---|---|
| **Quantitative data in the form of data matrices** | SPSS (. sav; por; .sys)<br>The statistical analysis software most frequently used in the social sciences, e.g. Stata (.dta) and SAS (.sas) | The most frequently used database software, e.g. MS Access (.mdb/.accdb) and dBase (.dbf)<br>MS Excel (.xls/.xlsx), |
| **Graphical data** | JPEG (.jpeg, .jpg), TIFF (.tif, .tiff)<br>Adobe Portable Document Format (PDF/A, PDF) (.pdf) | RAW image (.raw) |
| **Audio data** | MPEG-1 Audio Layer 3 (.mp3) | Free Lossless Audio Codec (FLAC) (.flac)<br>Audio Interchange File Format (AIFF) (.aif)<br>Wave form Audio Format (WAV) (.wav) |
| **Video data** | MPEG-4 (.mp4) | Motion JPEG 2000 (. mj2) |
| **Texts and documents** | MS Word (.doc/.docx)<br>PDF/A or PDF (.pdf)<br>Rich Text Format (.rtf) | HTML (.htm)<br>Open Document Text (.odt)<br>Plain Text (.txt) |

## 2.8. Primary quality assurance

Subsequently (within 5 working days), the data are submitted to a primary quality assurance check. In particular, all digital files are checked for corruption and completeness. A preliminary check of the content information for legal issues (especially with regard to personal data protection) is performed as well. While the Archive cannot assume responsibility for data quality, it should undertake at least a basic verification of the data for completeness (e.g., by comparing the dataset against the questionnaire) and coherence, and in particular, it should strive for such a level of quality and completeness of metadata that allows users to assess data quality themselves. The results of the primary quality assurance check are recorded in the SIP Database. Any information that is unclear, corrupt or missing is reported. The report is included in the AIP and forwarded to the Acquisitions & Ingest Administrator. The workers

designed by the Administrator and responsible for receiving a given submission are also responsible for any follow-up communication with the depositor: requesting SIP updates, clarification etc. When the primary quality assurance check and any updating is complete, any analogous parts of the SIP are digitized and preserved in a designated spot of the information system. The SIP serves primarily to preserve the authenticity and integrity of materials submitted by the depositor; this principle directs all data operations at this stage.

## 2.9. AIP generation

The Administrator or a worker designated by him/her generates a structured Archival Information Package which is comprehensible and can be utilized without special assistance of the depositors or the Archive. Before inclusion in the AIP, files are converted to standard CSDA formats prescribed in the AIP Template. Whenever possible, metadata are converted to XML schemas, especially by using the DDI format and at least to the extent recommended by CESSDA. AIP generation may take place not only following the receipt of a SIP but also on the basis of existing information in storage (as mediated by System Administration). Besides the data themselves and the metadata describing them, the AIP consists of additional information describing the preservation process itself, and especially:

- a timeline of important steps of the preservation process,
- a report from primary quality assurance,
- a report from the data audit managed by Administration becomes a part of AIP,
- links to existing data and datasets preserved by the Archive.

The AIP includes a “Packaging Information” file mapping its contents, i.e. what is included in its individual parts.

## 2.10. Collaboration on SIP and AIP audit, reconciliation of audit reports

When the AIP is generated, both the AIP and the original SIP are sent for audit. The audit is delegated to a worker who was not responsible for the preceding ingest stages. The result of the audit is recorded in the SIP Database. If the result is unsatisfactory, the AIP shall be sent back for corrections, additions etc. When the audit is completed, a final report on data ingest is elaborated, distributed to data producers/depositors and included in the AIP.

## 2.11. Generating Descriptive Information, transferring AIP to Archival Storage

After the AIP audit and any corrections/additions, the Descriptive Information document is generated. The document’s ID is linked to the AIP and related records in other databases. The document is saved in the SIP Database. The document contains such information obtained primarily from the AIP that facilitates identification in and retrieval from the Archive’s databases. It should also contain keywords describing the package contents so that it can be found; the keywords must be part of the ELSST Thesaurus. Subsequently, the Administrator or a worker designated by him/her transfers the AIP to Archival Storage, which confirms the receipt of a new/updated AIP. The responsible ingest worker (typically the one who processed the data after submission) makes sure the AIP is transferred to Archival Storage, this fact is recorded in the Descriptive Information and the Descriptive Information is transferred to the System Administrator along with a request for database update.

## 2.12. Coordinating updates

The Administrator coordinates any updates or corrections of SIPs and AIPs performed by Ingest workers. Such updates and/or corrections may be initiated both by the depositors of original files and by users or Archive staff. The CSDA Director may authorize the update/correction based on a documented request from the Acquisitions & Ingest Administrator. AIP revisions and new versions of AIP parts need to be documented (e.g., in the form of a syntax from the statistical programme in which the revision was implemented). The System Administrator records the updates in the Versions Database as well as in the AIP. Older versions of files are kept within the AIP; they must be clearly identified as such.

# 3. System Administrator

The function of System Administration includes the gathering, storing and making available of data and the checking of information on all activities taking place within the Archive. The System Administrator administers databases containing information about the Archive and the datasets preserved. He/she is responsible for database integrity. In collaboration with the IT Department of the Institute of Sociology, the Administrator also manages the Archive's hardware infrastructure, i.e. servers and drive volumes, and he/she is responsible for backing up the Archive's databases and datasets themselves.

## 3.1. The CSDA database system

The Archive's database consists of the following items:

- System Configuration Archive,
- Digital Dataset-Related Materials Archive,
- Analogous Dataset-Related Materials Archive,
- Document Archive,
- SIP Database,
- AIP Database,
- DIP Database,
- Versions Database,
- User Request Database,
- Staff List,
- Client Directory.

### 3.1.1. System Configuration Archive

The System Configuration Archive is a structure of directories for saving digital versions of documents describing the configuration of CSDA systems, manuals, templates, system performance reports, strategic documents, policies and plans. Responsible workers pass documents to the System Administrator for storage. The System Administrator and the CSDA Director have full permissions, including Write, while the permissions of other CSDA workers are limited to View and Download. The System Administrator checks the documents saved for latest version and manages their versions. Older versions are archived in a separate section of the Archive. Up-to-date versions of selected documents are made available on a suitable spot at the CSDA workplace.

### 3.1.2. Digital Dataset-Related Materials Archive

The Digital Dataset-Related Materials Archive is a structure of directories designed for storage of digital documents and other materials associated with the files preserved. A unique ID links each directory containing such materials with the given databases. The Archive maintains an open-access section and a restricted-access section. All workers have Write permissions for the former section and View and Download permissions for the latter section; Write permissions for the latter section are reserved to the System Administrator and the CSDA Director. The System Administrator checks and updates the archive regularly.

### 3.1.3. Analogous Dataset-Related Materials Archive

The Analogous Dataset-Related Materials Archive is a structure of folders with materials associated with the data preserved that exist in a form other than digital. They are stored in folders at the Archive's workplace. Responsible workers hands over the materials to the

System Administrator who places them in the Archive. A unique ID links each folder containing such materials with the given databases. The folder contains printed list of all folder's materials, the electronic version of this list is stored in the Digital Materials Archive. Materials of excessive volume are stored at a suitable place and the Archive contains a file with information about their location and availability. Each loan of materials is recorded in the Loan Book.

### 3.1.4. Document Archive

The Document Archive preserves official and other formal documents related to CSDA activities (submission agreements, Contracts of Providing the Access to Data Sets, cooperation agreements etc.) or copies thereof. Responsible workers hands over the documents to the System Administrator who places them in the Archive. A unique ID links each document or document folder with the given activity and function. Documents containing sensitive personal data or confidential data is placed in the Archive's vault.

### 3.1.5. Submission Information Package (SIP) Database

This database contains records about the course of data ingest. A new record is added upon the receipt of a depositor's request or upon contacting the data producer when a suitable dataset is identified. The record is written by workers receiving submission requests or responsible for given ingest functions.

A unique and stable ID is issued for each record, linking it to items stored in the Digital Materials, Analogous Materials or Document Archives or to records in the AIP and DIP Databases. The responsible worker further records the following information: date of receipt of submission request or recording a preservation intent by CSDA staff, name of project and/or database, depositor's institution, name of principal investigator or manager of the project from which the data originates (if applicable), name and addresses of the depositor's contact person. At the same time, he/she establishes a directory of the same ID in the Digital Materials Archive and, if applicable, a folder in the Analogous Materials Archive. He/she places in the directory/folder any materials associated with the data file while recording such placement in the database. A unique ID links each file with other databases and files preserved. Each directory/folder contains a Packaging Information file/sheet and records of issuing new versions, editions, file downloads etc. Such records are created by responsible Ingest workers.

### 3.1.6. Archival Information Package (AIP) Database

This database contains all AIPs preserved. A unique ID links each AIP with other databases and files preserved. Each AIP contains a Packaging Information file and records of issuing new versions, editions, file downloads etc. Such records are created by responsible Ingest and Preservation workers.

### 3.1.7. Dissemination Information Package (DIP) Database

This database contains all DIPs intended for users. A unique ID links each DIP with other databases and files preserved. Each DIP contains a Packaging Information file and records of issuing new versions, editions, file downloads etc. Such records are created by responsible Access workers.

### 3.1.8. File Versions Database

This special database of SIP, AIP and DIP versions and editions contains detailed information on changes made and references to materials in storage documenting such changes. Records are created by the Versions and Editions Administrator.

#### 3.1.9. User Request Database

This database contains user requests obtained outside the Dataverse system. Records are created by User Request Administration workers.

#### 3.1.10. Staff List

The Staff List states the different work roles assigned to Archive staff. It is linked to all the databases so that a responsible person can be identified for each of the Archive's data files and activities.

#### 3.1.11. Client Directory

The Directory contains information about the Archive's clients, their requests and agreements concluded with them.

## 3.2. Request Administration

The System Administrator gathers all staff and user requests for changes in the Archive's system configuration, files them in a directory on the Intranet and forwards them to the CSDA Director for assessment. The Administrator is responsible for implementing any changes in the system configuration ordered by the Director.

## 3.3. Archive Performance Monitoring

The Administrator monitors all CSDA processes. The monitoring is done in consideration of the Archive's reporting obligations and the system's possibilities. The Administrator defines monitoring indicators, methods and periodicity of measurement. At defined time intervals, monitoring reports are drafted, forwarded to the CSDA Director and saved in the Archive's database.

## 3.4. Query Processing

The Administrator processes all staff queries with regard to the Archive's database and provide information that can be obtained from that database.

## 3.5. Versions Administration

The Administrator administers the versions and editions of information packages (SIP, AIP, DIP) by:

1) assigning a unique ID to each package upon submission.

2) organizing information package audit by:

- assigning individual packages to responsible auditors based on package generation reports from the SIP, AIP and DIP Databases, and checking audit implementation,
- recording audit reports in the SIP, AIP and DIP Databases and assigning responsibility for reconciliation.

3) administering the versions and editions of information packages by:

- gathering and assessing requests to update information packages and reports of errors and problems in SIPs, AIPs and DIPs,
- requesting the production of new versions or editions of information packages,

- requesting the removal of a SIP, AIP or DIP from the data library if serious problems are identified,
- ordering updates from Ingest, Preservation and Access,
- maintaining records of versions and editions of information packages in the Versions Database and preserving the information underlying any updates.

An information package audit is delegated to a CSDA worker who did not participate on its generation. The audit involves a check of compliance with the submission agreement and a logical check of completeness and implementation of the steps of its generation. The worker records the audit in the SIP, AIP or DIP Database and includes in the database a report on any deficiencies found.

For various reasons data studies may be altered after publishing. These changes may be initiated either by the data archive or by the data producer. Versioning should take into account any changes made to the data file and any significant changes made to the metadata.

A new version is issued following any changes in the information package. A new edition is issued following any significant extension (e.g., inclusion of data for an additional country) or major modification (e.g., structural transformation of the data file) of the information package. The CSDA Director must approve any new editions or final removal of information packages.

CSDA assigns a new version to any data file that went through significant changes such as: addition of new variables, corrections of supplied data, significant formatting changes, difference in access and usage conditions or withdrawal of data elements. Every new version should be accompanied by a note defining the character of the changes (for example: "version 2.0: new variables added in data file").

CSDA assigns new branch of a current version to any data file that went through insignificant changes such as: minor changes in variable labels or spelling corrections. New branch is also assigned to any data file that had its metadata undergo significant changes - especially if it has effect on citation - such as: adding previously unknown creators, changing the year of publishing, rewriting of an abstract or changing keywords. Every new branch should be accompanied by a note defining the character of the change (for example: "version 1.1: edited spelling in data file").

Minor changes to metadata such as spelling corrections or addition of new keywords do not account for a version change.

## 3.6. Technology Base Administration

The Administrator is responsible for data file storage on designated storage media. The Administrator regularly checks the data in storage for corruption and errors. The administration function further includes regular backup of data files in case of damage to the main data storage facility.

## 3.7. Storage Media Administration

In collaboration with the IT Department of the Institute of Sociology, the Administrator manages the Archive’s data storage media. A designated structure of directories on the main IS server represents the main storage facility of the CSDA. Other storage media are located on the Dataverse server where DIPs are saved in a given format and readily available to the Archive’s clients. The Dataverse server does not serve to preserve data but only to distribute it to clients.

## 3.8. Backup Storage Media

The Administrator stores duplicate data files on storage media prescribed by the Disaster Recovery Plan. At defined time intervals, the Administrator duplicates the Archive's data files and provides for their storage in a physically separate and secure facility. This function is fulfilled by copying the data files onto defined external storage media or uploading them to a server outside the CSDA and the IS.

The Archive's data files are stored on a server with a regular backup policy. Furthermore, the entire Archive contents are copied to an external data storage located directly on the Archive's workplace regularly. In the course of each update, the data files are checked for corruption; the check is recorded in the Archive's internal database.

## 3.9. Error Checking

At defined time intervals, the Administrator checks data files on all the Archive's storage media so as no errors occur in any operation with those files. Error checking follows established methods of data integrity checks (CRC checksums, PDI Fixity Information). The Archive uses MD5 checksums. A text file with Fixity Information is maintained for every individual data file preserved and a copy thereof is saved in the Archive's internal database. Fixity Information is checked following any manipulation with data.

# 4. Access Coordinator

The Access Coordinator is responsible for the complex of customer services. In cooperation with the CSDA Director, he/she plans activities to satisfy users' needs. Under the customer services function, the Coordinator is responsible for timely and correct transfer of the Dissemination Information Package (DIP) in the required format. At the same time, the Coordinator continuously checks DIPs for completeness and accuracy, communicates with users and monitors their requests.

## 4.1. Specific activities falling under the coordinator's responsibility

- Coordination of Access Activities
- Monitoring of clients' satisfaction
- Control of Dataverse system functioning
- Query Activation & Response Delivery outside Dataverse system
- Administration and control of the database of information about registered users of CSDA
- Control of the fulfilment of the terms of condition
- DIP Generation

## 4.2. Coordination of Access Activities

In cooperation with the CSDA Director, the Access Coordinator participates in the drafting of a Customer Services Plan, submits the Plan to the Director for approval, delegates Access responsibilities, monitors the course of activities and fulfilment of the Plan, evaluates the results and recommends activities to facilitate Access efforts under CSDA projects. The Access Coordinator ensures proper reception of user requests and is responsible for timely processing thereof.

The CSDA processes most requests automatically, without active involvement of the coordinator, through the Dataverse system. The coordinator is responsible for checking that the system is working properly vis-à-vis users. If necessary, he/she removes deficiencies or reboot the system in collaboration with the System Administrator.

The coordinator is responsible for processing so-called ad hoc data (or metadata) query requests outside the Dataverse system. He/she consults and defines the processing procedures and deadlines in collaboration with the CSDA Director and codifies them.

Client satisfaction with CSDA data services is monitored through annual satisfaction surveys. User feedback is used to bring Access activities more in line with user expectations.

## 4.3. Query Activation & Response Delivery

This function maintains a list of data queries, compares the Archive contents for identification of data availability, and ensures delivery of data or information to CSDA users. Response delivery is automated for query requests submitted through the Dataverse system. Non-Dataverse Query requests are processed individually.

## 4.4. Data & Documents Retrieval

Data & Documents Retrieval in the Dataverse system is mostly automated. The advanced search function allows search by data files or tables as well as individual variables. The

advanced search criteria correspond to the metadata categories. The data search allows for combination of search criteria and is available for non-registered users as well. Access Coordinator is obliged to probe whether the search function setting corresponds to users' needs.

## 4.5. Provision of Access to Data Preserved by the CSDA

Besides the Retrieval function, unregistered CSDA users have access to simple frequency tables for each survey question and other related materials (questionnaires, cards etc.). Access to primary data files and complex analyses including older studies (for which only tables are provided) is restricted to registered users.

In registration process, users are asked to agree to the Conditions of Data File Use[3], including use for non-commercial or instructional purposes, copyright and citation rules, prohibition of sharing with other users, confidential treatment etc. At the same time, the user gives consent to the processing of personal data entered in the course of registration for CSDA purposes and commits to communicating bibliographical citations of all publications created on the basis of such data.

Registered users automatically obtain online access to primary data through the Dataverse system. At this stage, they are able to either view pre-defined tables from older surveys or download micro data in various data formats to her/his computer and use it for statistical analyses.

After the user completes registration, the Access Coordinator is obliged to grant the user full rights of access to all data and materials preserved by the CSDA (except a limited number of data files for which the depositor's written consent is required) as soon as possible, but no later than three working days after user's registration.

## 4.6. Response to Non-Dataverse Query Requests

Most user queries for data and documents are referred to the Dataverse system. Query requests outside the Dataverse system can only be individually processed in defined exceptional cases. Processing of such requests is consulted and specified in the cooperation with the CSDA director.

## 4.7. DIP Generation

Dissemination Information Packages (DIPs), which is in fact the dataset with metadata and all supplementary materials, accomodated with the unique PID, is created in the recording process in the Dataverse environment. Metadata and information about the dataset are displayed online. Browsing and downloading of datasets is allowed after registration. The DIP content can by created individually according to the client's requirements and CSDA possibilies if requests outside the Dataverse system occurs.

[3] Account - CSDA (cas.cz)