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Research and Innovation Action

CESSDA Strengthening and Widening

Project Number: 674939   Start Date of Project: 01/08/2015   Duration: 27 months

Deliverable 2.7 – Launched CESSDA Knowledge Platform

Dissemination Level	PU
Due Date of Deliverable	30/07/17
Actual Submission Date	(19/12/17)
Work Package	WP2 Dissemination and Communication
Task	2.1
Type	Other
EC Approval Status	11 January 2018
Version	V1.0
Number of Pages	p. 1-p. 20

Abstract: Building on the results of the Virtual Stakeholders' Forum (D2.1) and the Platform Content and Management Policy (D2.2), the CESSDA Knowledge-Sharing Platform was developed, tested, and launched in October 2017.

History

Version	Date	Reason	Revised by
1.0	19/12/2017	Created document	Jonas Recker

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Time Schedule before Delivery

Next Action	Deadline	Care of
Platform testing and bug fixing	30/09/2017	GESIS
Platform launch	20/10/2017	GESIS, CESSDA MO
Final review before submission	19/12/2017	CESSDA MO

EXECUTIVE SUMMARY

Over the years, CESSDA partners have created a significant body of knowledge on a broad range of topics. Much of this knowledge is captured in digital resources such as papers, presentations, reports, guidelines, and training materials. To ensure central and permanent access to these digital resources, Task 2.1 was dedicated to planning, developing, and implementing a virtual platform where these resources can be published and accessed by interested users.

D2.7 describes the completed platform, which was developed and implemented based on the results of D2.1 (Knowledge-Sharing Platform Forum Report) and D2.2 (Platform Content and Management Policy Report). The platform can be accessed at:

http://multiweb.gesis.org/csaw/#!Home.

Abbreviations and Acronyms

CESSDA ERIC	Consortium of European Social Science Data Archives
CESSDA MO	CESSDA Main Office
CESSDA SaW	CESSDA Strengthening and Widening
da|ra	Registration agency for social and economic data
DOI	Digital Object Identifier
GESIS	GESIS - Leibniz Institute for the Social Sciences
KP	Knowledge Platform
PM	Person Month
SP	Service Provider

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1. INTRODUCTION

It was the objective of Task 2.1 to conceptualise and build the CESSDA Knowledge Platform (formerly: Knowledge-Sharing Platform): a place on the web where digital CESSDA resources such as reports, presentations, training materials, and other open access publications can be made accessible to the CESSDA community.

Building on a survey among stakeholders to determine their requirements and expectations (D2.1: Knowledge-Sharing Platform Forum Report), a detailed description of functional requirements and organisational aspects such as policies, workflows and platform management was created (D2.2: Platform Content and Management Policy). This was followed by the implementation and testing phase where the actual platform was built, tested by users, and officially launched during the CESSDA SaW final consortium meeting in Dublin on October 20, 2017.

The test phase was structured as follows: A call for the contribution of content was issued via Basecamp and the test phase commenced in M23. All involved project partners iteratively tested the platform by uploading test documents. The testing focused on:

- user registration and password reset;
- upload of resources via the submission form (both full text and only metadata);
- searching and browsing;
- review and publication of resources;
- DOI registration.

During the test phase, bugs were identified and corrected, and the usability of the platform (the upload form in particular) was improved based on the feedback of the test users. Feedback was collected by means of a Google sheet and issues then transferred to GitLab for the developer.

2. DESCRIPTION OF PLATFORM FUNCTIONALITY

2.1 TECHNOLOGY AND USER INTERFACE

The platform was implemented by GESIS using a technology stack building on a current version of the open source software DSpace[1] and the Vaadin framework[2] for the implementation of the user interface. The latter makes it possible to create highly flexible user interfaces with current standards. This made it possible to meet the user demands/functional requirements with high precision.

To enable the persistent and unambiguous identification of resources submitted to the platform, two identifier systems are being used: the DSpace software itself enables the creation of platform-specific unique handles. These are unique locally within the platform. In addition, to ensure that resources can be persistently cited and accessed, a plug-in was developed to automatically register Digital Object Identifiers (DOIs) via da|ra, the German registration agency for social science and

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[1] Full software documentation for all DSpace releases is available under
https://wiki.duraspace.org/display/DSDOC/All+Documentation
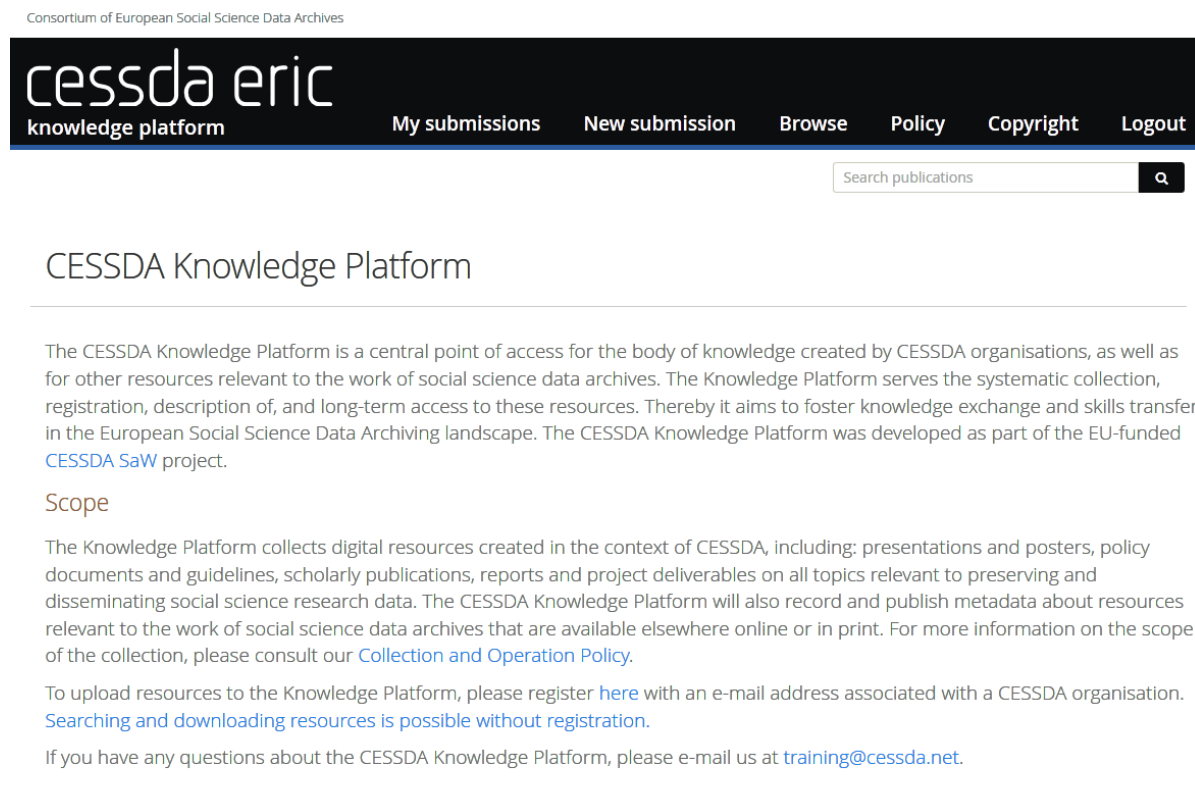[2] https://github.com/vaadin/framework

economic data[3]. The platform creates an XML file compliant with the da|ra metadata schema 4.0 to submit metadata for resources to be registered to da|ra. For this purpose CESSDA ERIC has been registered as a da|ra publication agent[4]. DOIs are registered under the prefix 10.18448. Suffixes are constructed automatically and contain a code to identify the archive or archives involved in the creation of a resource (see the CESSDA Knowledge Platform Collection and Operation Policy for more details: http://multiweb.gesis.org/csaw/#!Policy).

The Knowledge Platform webpages are structured as follows (see also Figure 1):

- **CESSDA Knowledge Platform Home**
    - Submit (Log-in)
        - New submission (uploading a new resource)
        - My submissions (account-specific overview of resources a user saved, submitted for review, or published)
    - Browse (Search and browse interface, download of resources)
    - Policy (Collection and Operation Policy)
    - Copyright (Copyright and Licensing Guide)

Figure 1: Knowledge Platform home screenshot (after log-in)

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[3] http://www.da-ra.de/en
[4] See https://www.da-ra.de/en/about-us/our-users/#C

2.2 USER ROLES AND PUBLICATION WORKFLOW

The platform distinguishes five types of users with different sets of permissions (see Table 1).

All resources published via the platform are accessible to anyone without the need to log-in (user type: anonymous). Staff of CESSDA-related organisations (including past, current, and prospective Service Providers) are permitted to register as a depositor and submit resources to the platform. Initial reviewers, too, are staff of CESSDA-related organisations. The roles of Publishing Reviewer and Administrator are filled by permanent CESSDA Training staff[5] and CESSDA Main Office staff.

Table 1: Knowledge Platform users and permissions

User type	Rights
Anonymous	● Access (read) all resources and (bibliographic) metadata
Depositors	● Access (read) all resources and (bibliographic) metadata ● Submit resources to the platform
Initial reviewers	● Access (read) all resources and (bibliographic) metadata ● Submit resources ● Edit metadata of resources submitted by Depositors ● Reject resources and return them to Depositors ● Approve resources and submit them to Publishing Reviewer
Publishing reviewers	● Access (read) all resources and (bibliographic) metadata ● Submit resources ● Edit metadata of resources submitted by Depositors ● Reject resources and return them to Initial Reviewer ● Register DOIs ● Publish resources
Administrators	● Access (read) all resources and (bibliographic) metadata ● Submit resources ● Edit metadata ● Withdraw and delete resources from the platform ● Assign registered persons to groups ● Assign rights to groups ● Register DOIs ● Publish resources

The publication process for the CESSDA Knowledge Platform is a three-step procedure (see Figure 2):

1) A registered user from a CESSDA-affiliated organisation ("Depositor") submits a resource to the platform via the upload form.
2) The submitted resource is checked by a reviewer ("Initial Reviewer"). This entails checking if the resource falls within the scope of the platform, looking for possible "red flags" concerning copyright, and checking (as well as correcting where necessary) the metadata

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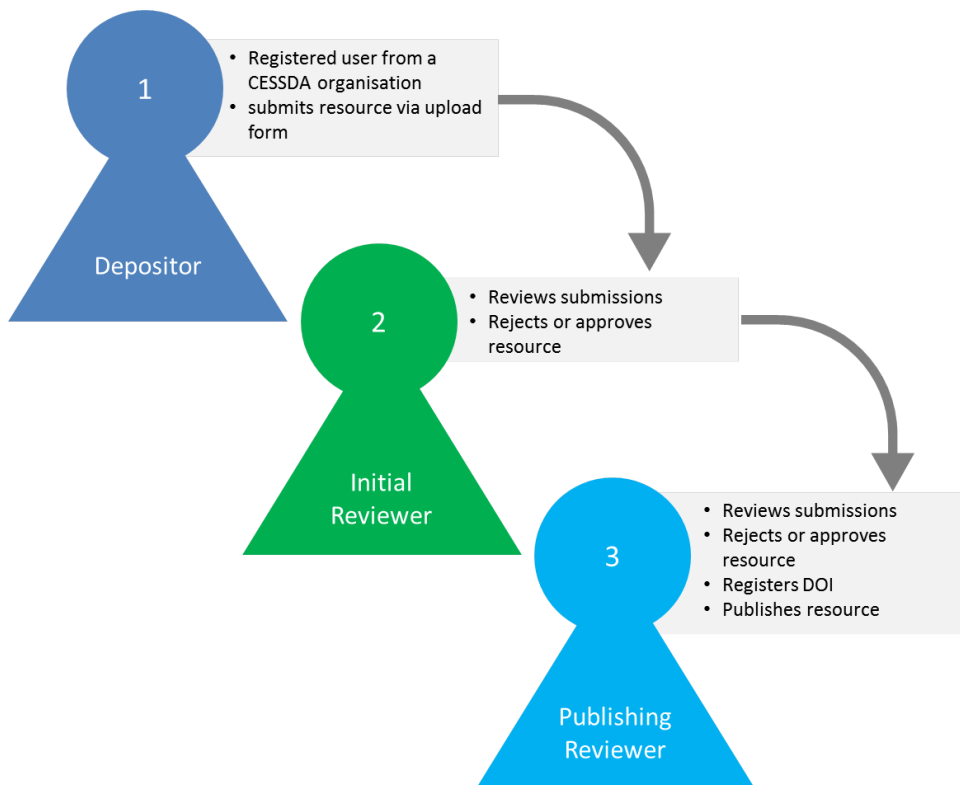
[5] https://www.cessda.eu/Research-Infrastructure/Training

that was entered by the depositor.

The reviewer may reject the resource and return it to the depositor with a comment.

3) If the Initial Reviewer approves the publication of a submitted resource, it is submitted to the Publishing Reviewer. The Publishing Reviewer will again check all aspects of the submission. The Publishing Reviewer has the additional rights to register a DOI and publish the resource to the platform.

Figure 2: Review and publication workflow

2.3 CONTENT ORGANISATION

With the help of the metadata schema (see Appendix 1: Metadata schema), (the content of) resources submitted to the platform can be described in considerable detail. Metadata fields are used as facets and can therefore be used to create collections of resources based on

- Creator (person)
- Organisation
- Resource type
- Subject
- Keyword
- Language
- Audience
- Publication date
- Event
- Project.

To ensure that CESSDA organisations are entered in a standardised form, controlled vocabularies are used. See Figure 3 for an example for filtering based on project title.

Figure 3: Faceted search example

3. MAINTAINING THE PLATFORM

CESSDA Training (hosted by GESIS) and CESSDA Main Office will pursue an active development of the platform content, i.e. they will identify resources for inclusion in the platform. They are suited for this work because they are involved in the planning and organisation of meetings and workshops where relevant documents are produced (e.g. CESSDA Expert Seminars). They will receive support from the Service Providers and CESSDA working groups in their activities to ensure that all relevant resources created are published via the platform.

The platform will be hosted on a CESSDA ERIC server once all bug fixing has been completed and the code prepared to be moved to the CESSDA Google cloud.

APPENDIX 1: METADATA SCHEMA

No	Property	Definition	Occ	Annotations, examples, valid values
Basic information				
1	Resource Type	Specification of the type of the submitted work	1	Controlled list • Audio recording • Bibliography • Blogpost • Book • Book Section • Book, edited • Conference paper • Conference poster • Conference Proceedings • Data set • Dissertation or thesis • Image • Interview • Journal • Journal article • Magazine article • Newspaper article • Preprint • Presentation, not at a conference • Report • Software • Technical documentation • Tutorial • Video recording • Webinar • Webpage • Working paper • Other
2	Titles	Container element to provide language-dependent title information for the resource	1	Generic term for 2.1-2.5
2.1	Language	The language in which the resource was created and/or published	1	Controlled list: ISO 639-1

2.2	Title (original)	Title of the work in the original language	1	
2.3	Subtitle (original)	Subtitle of the work in the original language	0-1	
2.4	Title (translated to English)	Title of the work translated to English	0-1	For resources in languages other than English
2.5	Subtitle (translated to English)	Subtitle of the work translated to English	0-1	For resources in languages other than English
3	Creators	Container element to provide the information about the creator(s) of the resource. Creators can be either a person or an organisation.	1-n	Generic term for 3.1 and 3.2 Exception: Not mandatory for the following resource types (see 1): • Audio recording • Book, edited • Conference Proceedings • Journal • Other
3.1	Person creators	Container element to provide the information about a person as creator	1-n	Generic term for 3.1.1-3.1-6
3.1.1	First name	First name of the creator (person)	1-n	
3.1.2	Last name	Last name of the creator (person)	1-n	
3.1.3	Affiliation (controlled)	The creator's affiliation	0-n	Controlled list: • CESSDA - Consortium of European Social Science Data Archives • ADP - Slovenian Social Science Data Archives • AuSSDA - The Austrian Social Science Data Archive • CSDA - Czech Social Science Data Archive • DANS - Data Archiving and Networked Services

				• DDA - Danish Data Archive • ESTA - Estonian Social Science Data Archive • FORS - Swiss Centre of Expertise in the Social Sciences • FSD - Finnish Social Science Data Archive • GESIS - Leibniz Institute for the Social Sciences • ISSDA - Irish Social Science Data Archive • LiDA - Lithuanian Data Archive for Humanities and Social Sciences • LISER - Luxembourg Institute of Socio-Economic Research • NSD - Norwegian Centre for Research Data • PROGEDO Research Infrastructure (France) • RODA - Romanian Social Data Archive • SASD - Slovak Archive of Social Data • SND - Swedish National Data Service • So.Da.Net - Greek research infrastructure for the social sciences • SOHDA - Belgian Social Sciences and Humanities Data Archive • TÁRKI - The Tárki Data Archive (Hungary) • UK Data Service • UniData - Bicocca Data Archive (Italy)
3.1.4	Affiliation (free)	The creator's affiliation	0-n	Affiliation when not selected from controlled list (3.1.3)
3.1.5	Person Identifier	Unique identifier of a person given as creator	0-n	Example: orcid.org/0000-0002-1825-0097 Example: 27068555 (Person)
3.1.5.1	Vocabulary of Person ID	The name of the framework or namespace from which the person identifier is taken and in which it is unique	req	Required if 3.1.5 is given Example: https://orcid.org Example: The Virtual International

				Authority File (VIAF)
4	Corporate creators	Container element to provide the information about an organisation as creator	1-n	Generic term for 4.1 and 4.2
4.1	Corporate creator (controlled)	The name of the organisation that is the creator of the resource	1-n	Controlled list • CESSDA - Consortium of European Social Science Data Archives • ADP - Slovenian Social Science Data Archives • AuSSDA - The Austrian Social Science Data Archive • CSDA - Czech Social Science Data Archive • DANS - Data Archiving and Networked Services • DDA - Danish Data Archive • ESTA - Estonian Social Science Data Archive • FORS - Swiss Centre of Expertise in the Social Sciences • FSD - Finnish Social Science Data Archive • GESIS - Leibniz Institute for the Social Sciences • ISSDA - Irish Social Science Data Archive • LiDA - Lithuanian Data Archive for Humanities and Social Sciences • LISER - Luxembourg Institute of Socio-Economic Research • NSD - Norwegian Centre for Research Data • PROGEDO Research Infrastructure (France) • RODA - Romanian Social Data Archive • SASD - Slovak Archive of Social Data • SND - Swedish National Data Service • So.Da.Net - Greek research infrastructure for the social sciences • SOHDA - Belgian Social Sciences and Humanities Data Archive • TÁRKI - The Tárki Data Archive (Hungary) • UK Data Service

				• UniData - Bicocca Data Archive (Italy)
4.2	Corporate creator (free)	The name of the organisation that is the creator of the resource	1-n	Corporate creator when not selected from controlled list (4.1)
5	Publication date	The date of publication	1	Possible input: YYYY (year) or YYYY-MM-DD (date)
5.1	Type of date	The type of publication date (year or date)	1	Controlled list: • Year • Date
6	Publication place	The place of publication	0-1	Example: Cologne, Germany Example: London Example: Bergen, NO
7	Access and use license	Container element to provide information about the access and use license under which the resource is distributed	1	Generic term for 7.1 and 7.2
7.1	Access and use license (controlled)	The license under which the resource is distributed	1	Controlled list: • Creative Commons Attribution 4.0 International (CC-BY) • Creative Commons Attribution-ShareAlike 4.0 International (CC-BY-SA) • Creative Commons Attribution-NoDerivatives 4.0 International (CC-BY-ND) • Creative Commons Attribution-NonCommercial 4.0 International (CC-BY-NC) • Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International (CC-BY-NC-SA) • Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International (CC-BY-NC-ND)
7.2	Access and use license	The license under which the resource is	1	Access and use license when not selected

	(free)	distributed		from the controlled list (7.1)
Content and audience				
8	Description	Container element to provide a description of the resource in different languages	0-1	Generic term for 8.1 and 8.2
8.1	Description (English)	A short summary of the resource content in English	0-1	Free text limit: 1500 characters
8.2	Description (other language)	A short summary of the resource content in the original language	0-1	Free text limit: 1500 characters
9	Subject	The general topic of the resource	0-n	Controlled list • Data Access • Dissemination • Open Data • Archiving (Curation and Preservation) • Metadata and Standards • Research Data Management • Pre-ingest • Data Acquisition • Data Processing and Documentation • Ingest • Training • Management of Data Archives • Data Protection and Ethics • Persistent Identifiers • Information Technology (IT) • Strategy and Policy • Other<
9.1	Other subject	Specification of "other subject"	Req	Required, if "other" is selected as Subject (9)
10	Keywords	Free keywords in English describing the content of the resource	0-n	
11	User	The user community or	0-n	Controlled list

	categories	communities for whom the resource is primarily intended		- Educators - Researchers - Academic support staff - Archive staff - Library staff - Policy makers - Other
11.1	Other user category	Specification of "other user category"	Req	Required, if "other" is selected as User category (11)
12	Related resources	Information about a resource related to the one described in the submission form	0-n	
12.1	Type of relation	Specification of the relationship between the resource described in the submission form and the related resource	Req	Required, if 12 is given. Controlled list*: - Is cited by - Cites - Is supplement to - Is supplemented by - Is continued by - Continues - Is new version of - Is previous version of - Is part of - Has part - Is referenced by - References - Is documented by - Documents - Is compiled by - Compiles - Is variant form of - Is original form of - Has metadata - Is metadata for - Is identical to - Is reviewed by - Reviews - Is derived from - Is source of *Source: da|ra Metadata Schema 3.1, table 3.1.9 Type of Relation (DOI:10.4232/10.mdsdoc.3.1)

Access					
13	Persistent Identifier	Persistent identifiers previously assigned to the resource	0-n	Example: 978-0142437247 Example: urn:nbn:de:0168-ssoar-461987
13.1	Identifier type	The type of persistent identifier	Req	Controlled list* • ARK • DOI • EAN13 • EISSN • Handle • ISBN • ISSN • ISTC • LISSN • PURL • URN • Other *Adapted from da|ra Metadata Schema 3.1, table 3.1.10 Identifier Type (DOI:10.4232/10.mdsdoc.3.1)
13.1.1	Other persistent identifier type	Specification of the "other" persistent identifier type	Req	Required if "other type of persistent identifier" is selected (13.1)
14	Access URL	A web address at which the resource can be accessed	0-1	
14.1	Date accessed	Date an electronic resources was last accessed at the given web address	0-1	Input format: YYYY-MM-DD
Journals and edited works					
15	Publication title	The title of the publication of which a resource is a part	0-1	Examples: the title of a journal, a web page, or a collection of essays.

16	Editor	The person or organisation in the role of the editor of a resource	0-n	For persons use the following form: Last name, first name.
17	Publisher	The name of the publisher of the resource	0-n	Example: Routledge
				Example: Digital Curation Center
18	Volume	The volume of the publication or journal of which the resource is a part	0-1	
19	Issue	The issue of the publication or journal of which the resource is a part	0-1	
20	Pages	The overall number of pages or the start page and end page of the resource	0-1	Example: 455-467
				Example: 23
Events				
21	Event title	The title of the event at which the resource was delivered	0-1	
22	Event date(s)	Container element to provide information about the date or date range when an event took place	0-1	Generic term for 22.1 and 22.2
22.1	Event from	The date or date range when the event took place: start date	0-1	Input format: YYYY-MM-DD
22.2	Event until	The date or date range when the event took place: end date	0-1	Input format: YYYY-MM-DD
23	Event place	The place where the event took place	0-1	

Project				
24	Project name	The name of the funded project in which the resource was created or delivered	0-1	Example: CESSDA-SaW
25	Project funder	The name of the organisation who funded the project in which the resource was created	0-1	Example: European Commission
26	Project ID	The identifier assigned to the project by the funder	0-1	Example: Horizon 2020 grant agreement number
Code				
27	Programming language	The programming language used to create the software	0-n	Controlled list: • ActionScript • AppleScript • Asp • BASIC • C • C++ • Clojure • COBOL • ColdFusion • Erlang • Fortran • Groovy • Haskell • Java • JavaScript • Lisp • Perl • PHP • Python • Ruby • Scala • Scheme • Other
27.1	Other programming language	Specification of other programming language	Req	Required if "other" programming language is selected (27)

28	Target Operating System	The Operating System(s) for which the software was written	0-n	Controlled list: - Windows - Linux - FreeBSD - Chrome OS - SteamOS - Android - Mac OS X - Haiku - eComStation - ReactOS - Syllable - SkyOS - Other
28.1	Other Operating System	Specification of other Operating System	Req	Required if "other" Operating System is selected (28)
29	DOI request	Request a DOI to be registered for the resource	0-1	Controlled list: - More than one CESSDA organisation (member or partner) - CESSDA - Consortium of European Social Science Data Archives - Other - ADP - Slovenian Social Science Data Archives - AuSSDA - The Austrian Social Science Data Archive - CSDA - Czech Social Science Data Archive - DANS - Data Archiving and Networked Services - DDA - Danish Data Archive - ESTA - Estonian Social Science Data Archive - FORS - Swiss Centre of Expertise in the Social Sciences - FSD - Finnish Social Science Data Archive - GESIS - Leibniz Institute for the Social Sciences - ISSDA - Irish Social Science Data Archive - LiDA - Lithuanian Data Archive for Humanities and Social Sciences - LISER - Luxembourg Institute of Socio-Economic Research - NSD - Norwegian Centre for

				Research Data • PROGEDO Research Infrastructure (France) • RODA - Romanian Social Data Archive • SASD - Slovak Archive of Social Data • SND - Swedish National Data Service • So.Da.Net - Greek research infrastructure for the social sciences • SOHDA - Belgian Social Sciences and Humanities Data Archive • TÁRKI - The Tárki Data Archive (Hungary) • UK Data Service • UniData - Bicocca Data Archive (Italy)
DOI Registration (Internal fields)				
30	da|ra General resource type	Predefined terms to provide information about the type of resource being registered to differentiate between registered resources	Req	Required if "yes" is selected under 30 Controlled list: • Collection • Dataset • Text • Software • Image • Audiovisual • DataPaper • Event • Model • PhysicalObject • Service • Sound • Workflow • Other Source: da|ra Metadata Schema. Version 4.0. Table 4.1.1 ResourceType. DOI: 10.4232/10.mdsdoc.4.0
31	da|ra Availability (controlled)	Predefined terms to provide information about different types of availability conditions of the	Req	Controlled list: • Download • Delivery • On-site. • Not available

		registered resource.		• Unknown Source: da|ra Metadata Schema. Version 4.0. Table 4.1.3 availabilityType. DOI: 10.4232/10.mdsdoc.4.0