



## INSTRUCTIONS FOR DEPOSITING HISTORICAL DATA IN EASY

Version 2.1 – July 2011

*This is an old version. The new instructions are currently only available in Dutch. The English translations of these new documents will follow as soon as possible.*

You are about to deposit historical data in the online archiving system EASY. All kinds of data can be uploaded in EASY, irrespective of the subject, the period, the region, or the source of study. It is also possible to store most types of digital data, such as text, encoded or unencoded statistics, visual material and audio.

Depositing data in EASY is subject to specific guidelines. These guidelines relate primarily to the file format of the files, and the documentation files to be provided. The following instructions will assist you during the deposit procedure, which consists of filling in the metadata fields and uploading the data and documentation files in EASY.

The data you deposit in EASY will be archived in accordance with the guidelines of the internationally acknowledged Data Seal of Approval, <http://www.datasealofapproval.org/>.

The metadata fields used are in accordance with the guidelines of Dublin Core standard. For more information visit <http://dublincore.org/>.

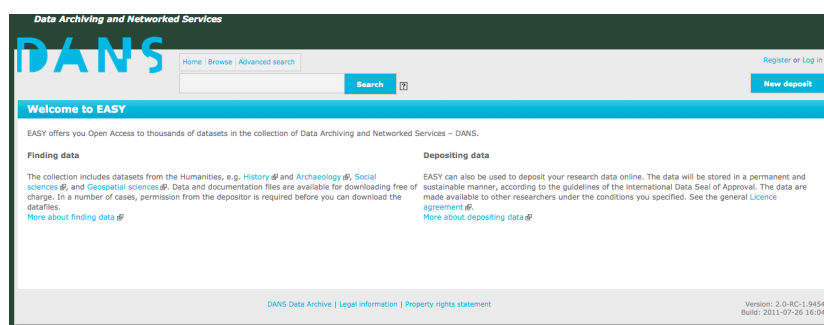




Figure 1: Homepage EASY



## Deposit procedure in brief

1. Prepare your data for uploading: check formats, size of files, and, if applicable, make files anonymous and make a ZIP-file.
2. Go to <http://easy.dans.knaw.nl> and log in. If you don't have an account yet, please register yourself first.
3. Click on the button , choose a discipline and click .
4. Fill in all relevant metadata fields on screen 1-4.
5. Upload the data file(s) via the field 'Upload dataset' (screen 1).

Upload dataset    

6. Check the terms of the licence agreement (screen 4).

<b>Deposit:</b>	<a href="#">1: Required elements</a> <a href="#">2: Recommended elements</a> <a href="#">3: Additional elements</a> <a href="#">4: Overview and submitting</a>
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**License \***

In order to deposit a dataset, you must accept and understand the [Licence agreement](#) (PDF). Please note that this agreement includes that:

- You grant DANS a non-exclusive licence to store and make available to third parties the abovementioned digital dataset, in accordance with the 'access' conditions you indicated.
- You declare that you are the holder of rights to the dataset and/or entitled to act in the present matter with the permission of other parties that hold rights.

☒ Yes, I accept and understand the terms of the License agreement

Note: the License agreement file will also be sent to you in an E-mail confirming your deposit action.

7. Click on the button .



## Start of the deposit procedure

### Guidelines for depositing historical data files

You are requested to deposit all data and documentation files concerning your research.

If you are depositing a large number of **data files**, please send a file list along. This file list must include an overview of the file names and a description of their contents.

Essential **documentation files** are:

- a description of the variables in your database(s) or spreadsheet(s) and an explanation of the codes used, in the form of a code book
- a description of the (archival) sources, the selection procedure used, and a description of the way in which the archival sources have been used. Please also indicate whether the information has been standardized, and which standards or classification systems have been used. E.g. HISCO for historical professional titles (<http://historyofwork.iisg.nl/> )
- all research and project reports relating to your research and the dataset.
- all (academic) publications which originate from your research, and relate to the dataset.

If you want to deposit interview data, you'll need to upload a declaration of mutual consent on making the data public from both the interviewer and the person interviewed. Making the data public may be subject to some restrictions, please mention this in the declaration clearly. If the file concerned is a video, please deposit a mutual declaration on portrait right as well.

### Preferred formats

DANS has a list of preferred formats. When the data are deposited in these formats, DANS will be able to guarantee sustainable use of the data. See the Annex to this document for a complete list.

### Size of data files in EASY

Considering the size of the files, files up to 100 MB may be uploaded smoothly in one go. If the file is larger than 100 MB, it is recommended to contact a staff member at DANS via [info at dans.knaw.nl](mailto:info@dans.knaw.nl).

### Language in EASY

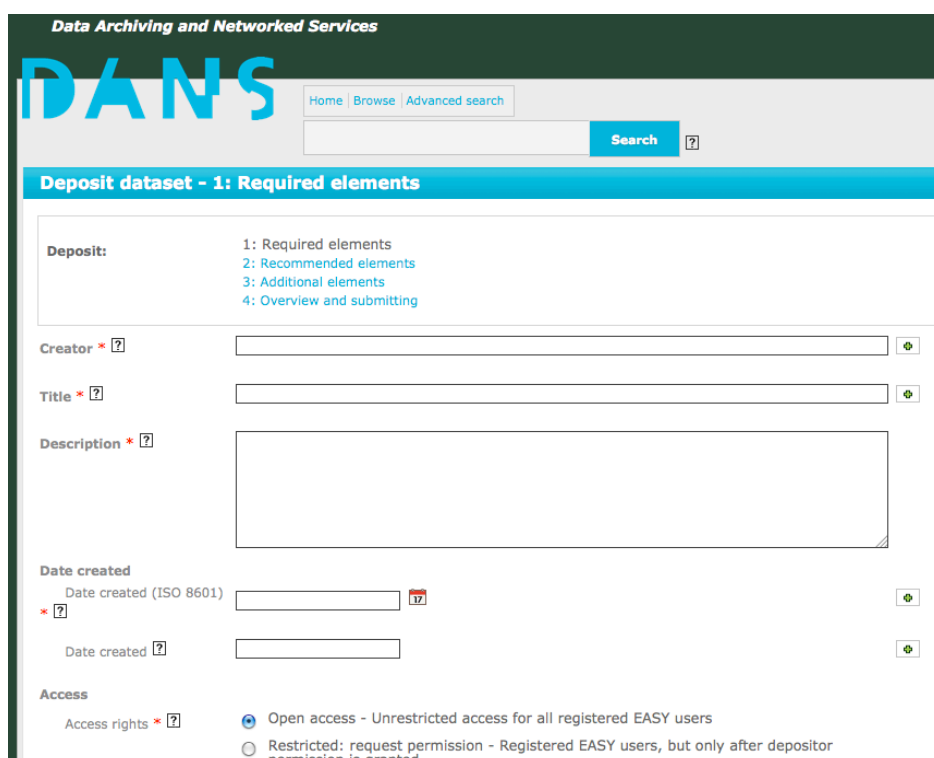
In order to make the data archive accessible to researchers abroad as well, EASY is in English. However, DANS recommends using the same language for the metadata fields as used for your data. If all documentation and data files are only available in Dutch, please use Dutch for the metadata fields as well. If your data file includes (some) documentation in English, we request you to fill in the metadata in English as well.



## **Saving**

The deposit procedure comprises several steps. After each step, your input will be saved. If you wish to save your input when working on one of the steps, you can do so by clicking "Save draft".


You can safely leave the system, return later and continue where you left off. You will find your work in progress under [My datasets](#) once you are logged in.





**Deposit dataset - 1: Required elements**

**Deposit:**



- 1: Required elements
- 2: Recommended elements
- 3: Additional elements
- 4: Overview and submitting


**Creator \***  

**Title \***  

**Description \***  

**Date created**

**Date created (ISO 8601) \***   

**Date created**  

**Access**

**Access rights \*** ☐ Open access - Unrestricted access for all registered EASY users

☐ Restricted: request permission - Registered EASY users, but only after depositor permission is granted

Figure 2: Metadata fields – some required (\*), some optional





## Filling the metadata fields

After having clicked the 'Start deposit' button, you will see four metadata screens, based on the international Dublin Core Metadata standard.

1. Required elements
2. Recommended elements
3. Additional elements
4. Overview and submitting

In these four screens, there are only eight required metadata fields to fill in. However, if you decide to fill in more fields, it will be easier for other people to find and understand your dataset. The fields marked with \* are required.

At the bottom of each screen you will see the buttons:

-  **Leave procedure** : Interrupt the deposit procedure
-  **Save draft** : Save changes in the interim
-  **Previous** or  **Next** : Go to the previous or next screen

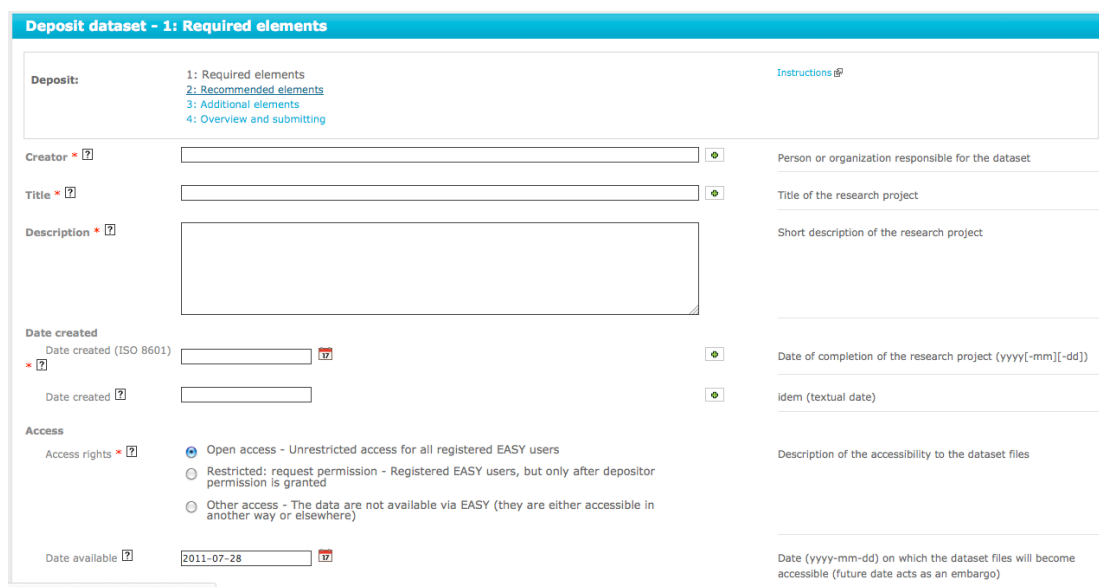





Figure 3: Part of screen 1 – Required elements


## Screen 1: Required elements

You are obliged to fill in most fields in this screen. By clicking on , a help function appears with information on this particular field. By clicking , you can add an additional field for the same item.

Important metadata fields for controlling access to your data are:

- 'Access rights': Here you can indicate under which conditions your data will be accessible. You can choose between Open access, Restricted access:

request permission and Other access. For more information, please click .

- 'Date available': You can use this field to impose a temporary embargo of no more than two years on the data. As soon as the embargo has expired, the access category indicated by you will become effective. For more information, please click .

Through the metadata field 'Upload dataset' you can upload your data files. Please make sure the data follows the guidelines as mentioned on page 2-4.

Upload dataset 

Use the 'Browse' button behind the 'Upload dataset' metadata field to search the correct file, select it and click 'Upload' to start uploading the file. The files will be added to EASY and archived.

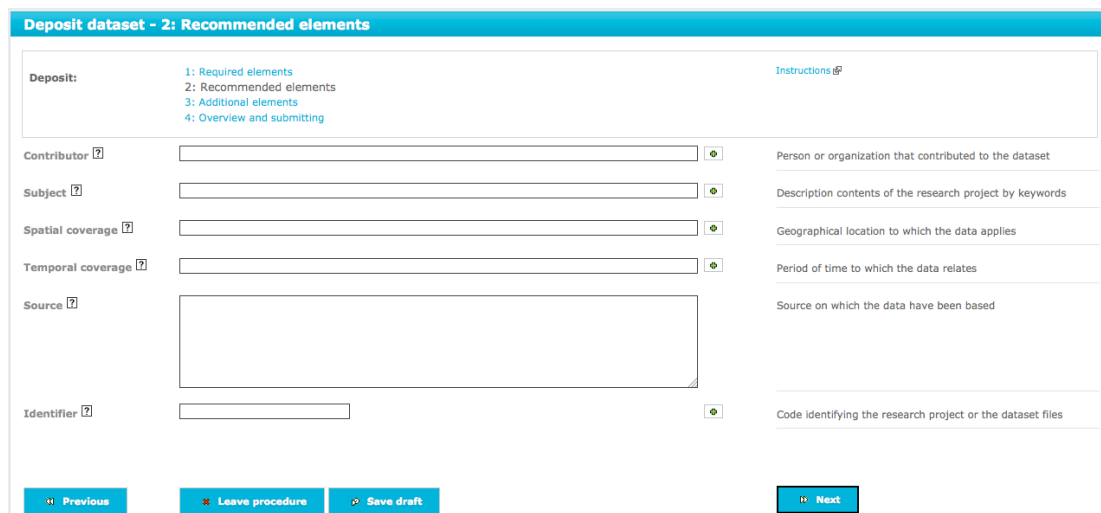




Figure 4: Overview of screen 2 – Recommended elements

## Screen 2: Recommended elements

This screen contains a set of metadata fields which are not mandatory, but we strongly advise you to fill in the field 'subject' and, if applicable, also the fields 'spatial coverage' and 'temporal coverage'. By clicking on , a help function appears with information on this particular field. By clicking , you can add an additional field for the same item.

### (Persistent) identifier?

EASY assigns a Persistent Identifier to your dataset automatically after the entire deposit procedure. In case your dataset already has an identifier or identifiers of another institution, please mention these identifiers including the name of the institution involved.

### NWO / ARVODI Contract

If you are depositing a dataset as part of a NWO-DANS Data Contract agreement or an ARVODI contract (General Government Terms and Conditions for Public Service Contracts), please fill in the NWO or ARVODI reference number in the field 'Identifier'.

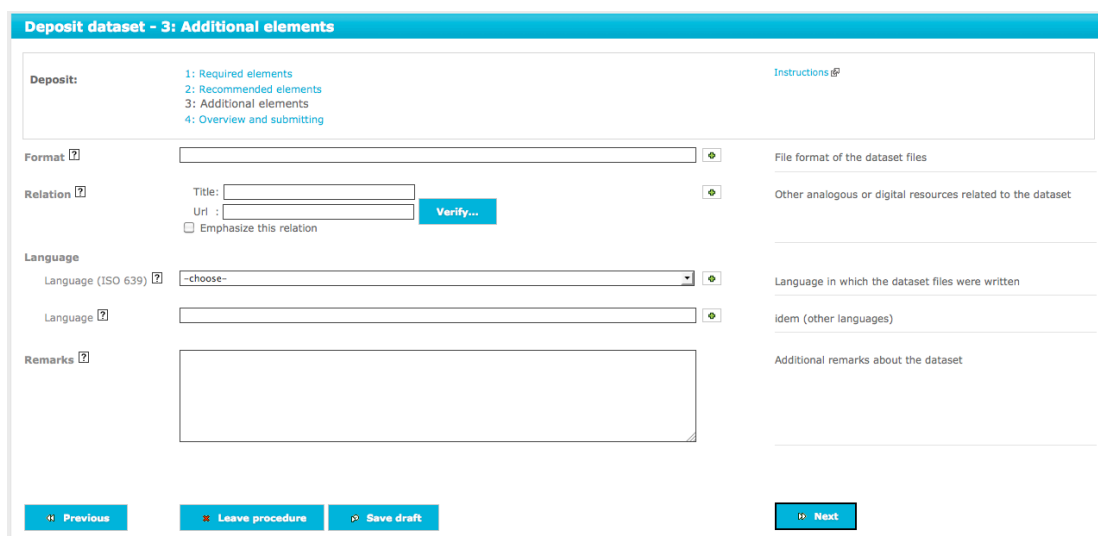




Figure 5: Overview of screen 3 – Additional elements

### Screen 3: Additional elements

This screen contains a set of metadata to be filled in optionally.

By clicking on , a help function appears with information on this particular field.

By clicking , you can add an additional field for the same item.

### Remarks

The metadata field 'Remarks' can be used to fill in additional information about the dataset you can't put elsewhere. You can also use it as a one-way communication pane to give advice for future users when using the data, or to ask the datamanager at DANS to alter the access category of some of the files of your dataset. For example, if you would like to deposit both open access and restricted access files in one dataset, please mention it in the field 'Remarks'.



**Deposit dataset - 4: Overview and submitting**

**Deposit:** 1: Required elements 2: Recommended elements 3: Additional elements 4: Overview and submitting [Instructions](#)

**License \*** In order to deposit a dataset, you must accept and understand the [License agreement](#) (PDF). Please note that this agreement includes that:

- You grant DANS a non-exclusive licence to store and make available to third parties the abovementioned digital dataset, in accordance with the 'access' conditions you indicated.
- You declare that you are the holder of rights to the dataset and/or entitled to act in the present matter with the permission of other parties that hold rights.

☐ Yes, I accept and understand the terms of the License agreement

Note: the License agreement file will also be sent to you in an E-mail confirming your deposit action.

**Overview of supplied metadata**

Access rights	Open access - Unrestricted access for all registered EASY users	Description of the accessibility to the dataset files
Date available	2011-07-28	Date (yyyy-mm-dd) on which the dataset files will become accessible (future date acts as an embargo)
Identifier	Fedora Identifier: easy-dataset:43992	Code identifying the research project or the dataset files
Upload dataset		Add the dataset files

Note: After submitting it will not be possible to make any changes to the dataset (but you can always contact DANS to alter metadata or files).

[Previous](#) [Leave procedure](#) [Save draft](#) [Submit](#)

Figure 6: Overview of screen 4 – Overview and submitting

### Screen 4: Overview and submitting

In this screen you see all metadata you entered and the files you uploaded. If you agree to the DANS Licence Agreement by ticking the appropriate box, you'll be able to click 'Submit' to complete the deposit.

After this you won't be able to change or update the dataset yourself anymore. If you want to alter the dataset after submitting, please contact a staff member at DANS via [info at dans.knaw.nl](mailto:info@dans.knaw.nl).

If you do not succeed in submitting the data, you may have forgotten to fill in a mandatory field. The system will indicate which field it concerns. Once you have filled in the field concerned, click the 'Submit' button again to submit the data.

## The procedure after depositing

After you will have deposited the data, a staff member at DANS will process them in accordance with an established protocol. If the dataset meets all criteria for reuse, the dataset will be made accessible to others in EASY, that is, depending on the Access rights and a possible embargo indicated by you at the deposit of the data.

## More information

Contact DANS via [info at dans.knaw.nl](mailto:info@dans.knaw.nl) in case you experience any difficulties during the deposit procedure or when you have additional questions.



## **DANS Preferred and Accepted File Formats**

*Version: November 2010*

The preferred and accepted formats include the following types of files:

1. Audiovisual files
2. Text files
  - a. Fixed and reusable text, presentations
  - b. Plain text
  - c. Mark-up
3. Spreadsheets
4. Statistic files
5. Databases
6. Cartographic data (CAD) (DWG, DXF)
7. Geographic Information System (GIS) (TAB, SHP)

### **1. Audiovisual files**

#### **Preferred formats**

##### *Moving images*

- MPEG-2
- MPEG-4 H264
- lossless AVI (Windows)
- QuickTime DV (Mac)

##### *Still images*

###### *Raster images (all current formats)*

- JPEG
- TIFF

###### *Vector images (AI, EPS)*

- PDF/A
- SVG

##### *Audio*

- MP3 (256 kbps)
- WAV



## 2. Text files

### **a. Fixed and reusable text, presentations**

#### **Preferred formats**

*Fixed text (ODT, DOC, DOCX, RTF)*

- PDF/A

*Reusable text (DOC, DOCX, RTF) and Presentation (PPT, PPTX)*

- PDF/A and ODT (both)

#### **Accepted formats**

- Postscript
- Word
- WordPerfect, from version 4.2

### **b. Plain text**

#### **Preferred format**

- UNICODE with Byte Order Mark (UTF-8, UTF-16 or UTF-32)

#### **Accepted formats**

- ASCII (7 bit)
- ISO 8859 character sets
- MS-DOS code pages
- MS-Windows code pages
- Apple code pages

NB: It is possible to use special punctuation marks (diacritical marks) in plain text files, but whether it is possible to read these files strongly depends on the character sets (ASCII, unicode) and code pages chosen and documented.

### **c. Mark-up**

#### **Accepted formats**

- XML (including XHTML) with DTD or schema
- SGML (including HTML) with DTD



### 3. Spreadsheets (XLS, XLSX)

#### Preferred formats

- PDF/A and ODT (both)

#### Accepted formats

- MS Excel
- Lotus 1-2-3
- Quattro Pro
- Delimited text files (fixed format or comma/pipe/tab delimited with double inverted commas marking the "textual values") with description of the fields and a codebook.

### 4. Statistic files

#### Preferred formats

- SPSS portable files
- SAS transport files
- STATA transport files

### 5. Databases

#### Preferred format

- ANSI SQL
- CSV

#### Accepted formats

- MS Access 95 and higher
- dBase III+ and higher
- DataPerfect
- Filemaker Pro 3.0 and higher
- Paradox
- Delimited text files (fixed format or comma/pipe/tab delimited with double inverted commas marking the "textual values") with a data dictionary – a description of the database structure (tables, fields, data types, keys, and relations) – and a codebook setting out the values of the codes or abbreviations.



## 6. Cartographic data (CAD) (DWG, DXF)

Vector drawings, with the positions of the cartographic objects set out in a (geographically) meaningful coordinate system.

### Preferred format

- DXF version R12
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### Accepted formats

- AutoCAD

## 7. Geographic Information System (GIS) (TAB, SHP)

Vector drawings, with the geographical positions, as well as substantive characteristics (attributes) linked to the cartographic object. In addition to the cartographic elements (vector elements and otherwise), GIS data also include (plain) table information for which a data dictionary may be necessary in order to be able to understand and reuse the contents.

### Preferred format

- MID/MIF

### Accepted formats

- ESRI Shapefiles
- Mapinfo
- GML
- Grass
- Idrisi
- Surfer