Terms of Use of the *Base d'hébergement de projets*

Introduction

The purpose of these Terms of Use, effective as of 1st May 2017, is to guarantee consistent and harmonious use of the *Base d'hébergement de projets* ("Project hosting database", hereafter referred to as BHP), developed as part of the symogih.org project, by defining the principles of its use. It follows on from the previous Terms of Use drawn up on 10 July 2007, 11 February 2010, and 15 November 2011 to regulate use of the BHP.

Since BHP's mission is to serve a constantly growing community of users, the Terms of Use have been drawn up to set out a number of rules that ensure operational transparency and guarantee contributors' legitimate rights. Anyone who has been provided with an account for logging on to the BHP commits to respecting the principles defined in these Terms of Use.

Presentation of the symogih.org project

The symogih.org project's goal is to develop a generic model for storing historical information to guarantee interoperability and allow selective publication:
- firstly, it must allow historians to share the scientific data they have gathered during their research;
- secondly, it must make part of this information accessible via online publication and interoperability with other resources using Semantic Web technologies.

The symogih.org project is the result of the observation that a large amount of information gathered and classified for the process of preparing scientific publications is usually lost once they have been completed. Instead of being lost, the information can be stored and shared by developing a suitable IT tool, allowing the scientific community to benefit from the cumulative effect of research by obtaining access to what will eventually be a far larger amount of information than one researcher working alone can gather. The information is also subject to a collective checking process. This led to the creation of the BHP, a database for collective use that is at the heart of the symogih.org project.

The symogih.org project has been developed at the *Laboratoire de recherche historique Rhône-Alpes* (UMR 5190 LARHRA – CNRS, Lyon and Grenoble Universities). The laboratory provides servers hosting the BHP and related software as well as IT support and regular back-ups of the data in the database using the services of the TGIR (very large research infrastructure) Huma-Num.

In accordance with the consolidated version of the French Data Protection Law 78-17, dated 6 January 1978, the symogih.org project has been registered with the French Data Protection Authority (CNIL).

Project governance, administration, and ownership

At the time of drafting these Terms of Use, *project management* of the symogih.org project is the joint responsibility of Vincent Alamercery, Francesco Beretta, Bernard Hours, and Pierre Vernus (hereinafter "project directors"). Any changes to this group will be published in the list of project directors that can be consulted in the Members section of the symogih.org website. The list is deemed valid on the day it is consulted.

At the time of drafting these Terms of Use, *data administration* of the data contained in BHP is the responsibility of Vincent Alamercery, Francesco Beretta, and Pierre Vernus (hereinafter "data administrators"). Any changes to this group will be published in the list of data administrators that can be consulted in the Members section of the symogih.org website. The list is deemed valid on the day it is consulted.

- Data administration tasks are carried out by using a special account, called the "data administrator account", which is different from an individual user account.
- All new data administrator accounts include the signature of a copy of the Terms of Use which specifies the login assigned to the new account and binds the data administrators to strict respect of the principles set out in the Terms of Use.

At the time of drafting these Terms of Use, *Database administration* and *development of data input and access interfaces* is the responsibility of Sylvain Boschetto and Djamel Ferhod (hereinafter "database administrators"). Any changes to this group will be published in the list of database administrators that can be consulted in the Members section of the symogih.org website. This list is deemed valid on the day it is consulted.

- Database administration tasks are carried out by using a special account called the "database administrator account", which is different from an individual user account.
- All new database administrator accounts include the signature of a copy of the Terms of Use which specifies the login assigned to the new account and binds the database administrators to strict respect of the principles set out in the Terms of Use.

The *intellectual property* in the *Système Modulaire de Gestion de l'Information Historique* (symogih.org) project and database architecture and development belongs to CNRS. The *Laboratoire de recherche historique Rhône-Alpes* (hereinafter LARHRA) is *the producer of the Base d'hébergement de projets* (BHP) as defined by article L 341-1 of the French Intellectual Property Code.

Data stored in the database are governed by the principles set out below in the paragraph *Principles for using the BHP database.*

Principles for using the BHP database

The main principle governing the functioning of BHP is the pooling of information *between members* giving them the right to draw on shared information to produce their own scientific works.

The different accounts

- A member of the symogih.org project is defined as anyone who has signed the Terms of Use.
- The project's members have an account composed of a login and a password.
- The list of the project's members is published in the Members section of the symogih.org website (surname, given name, institution).

There are four different types of accounts.

User account

A *user account* is an account for individual use designed for the production and use of data in the context of historical research. All the records created by a project member with a user account are directly linked to their login.

Each member with a user account remains the owner of the information they introduce into the database and are responsible for this information :
- As a matter of principle, only members can modify the records in the tables they have produced.
- They agree to the irreversible pooling of the information.

Technical account

A *technical account* is an account for individual use created solely to provide technical access to BHP in the context of a specific request. Symogih.org project members are not authorised to produce data with their technical accounts or to use BHP data when such use does not relate to technical access in the context of a specific request.

Data administrator account

A *data administrator account* is an account for individual use created solely for the purposes of administrating BHP data for a member of the symogih.org project appointed by the project directors as a data administrator. Symogih.org project members are not authorised to produce data with their data administrator accounts or to use BHP data when such use does not relate to data administration.

Database administrator account

A *database administrator account* is an account for individual use created solely for the purposes of administrating the database and developing data input and access interfaces for a member of the symogih.org project appointed by the project directors as a database administrator. Symogih.org project members are not authorised to produce data with their data administrator accounts or use BHP data when such use does not relate to database administration.

Collaboration and research group

Owners of the records can use a formal written agreement to assign the right to modify them to one or more members of the symogih.org project, hereinafter *collaborators*, or members of a research group they belong to. The records nevertheless remain their property.

A collective research project is defined in BHP as a Collective Actor (www.symogih.org/ontology/CollectiveActor) categorised as "Informal collectivity" (http://www.symogih.org/resource/AbOb1052). Members of the same research project form a research group.

- BHP users who wish to become a member of a research project register with the database administrators for a determined period.
- All new accounts specific to a research project created for a user are preceded by the signature of a copy of the Terms of Use which specifies the login assigned to the new account.
- A user who belongs to one or more research groups will have one or more accounts: a personal account and one or more accounts linked to research groups, one per project.

Visibility policy and data use

A very important distinction is made in the BHP between two domains:
- the domain that contains the database records relating to the definition of historical objects (actors, abstract objects, material objects, digital objects, bibliography, places, etc.), whose function is to assign an identifier to each object as well as a number of elementary identification metadata (name, date, text properties, type, class, etc.), including data relating to documentation and reproduction;
- the domain that contains the database records used for storing knowledge units: content, information, their respective roles, and the respective text and digital properties.

Historical object visibility

Since historical objects serve as "authority files", the database records used to identify them by means of elementary metadata and documentation and reproduction data (printed, digital, online, etc.) are by definition visible to all users and can be published online free of charge without the prior agreement of their producers.

Knowledge unit visibility

With regards to the knowledge unit domain:
- All records in this domain are visible for all members of the symogih.org project within BHP.
- Free online publication of knowledge units and all records relating to their respective properties is defined by their respective producers, unit by unit, thanks to the property "*is_web_publishable*".
  - The default setting is that not all records in the same domain can be published online (is_web_publishable = false).
  - If authors, their collaborators, or group members then define the record and all those that depend on it via inheritance as publishable online (is_web_publishable = true), this choice is irreversible to guarantee the stability of the websites publishing the data.
- Linked data publication is defined by the respective authors using the property "*is_rdf_publishable*".

- The default setting is that not all records in the same domain are published as open data (is_web_publishable = false).
- If authors, their collaborators or group members then define the record and all those that depend on it via inheritance as publishable as linked data (is_web_publishable = true), this choice is irreversible to guarantee the stability of the websites publishing the data.

These properties apply directly to the records for the main entities (information, etc.) and via inheritance to the records that depend on them (roles, dating, etc.).

Data administration

In the event of withdrawal, exclusion, or any other reason terminating symogih.org project members' access to BHP, they will not be able to request either the deletion of the records they have pooled or the deletion of the information the records contain. In the event of withdrawal, exclusion, or any other reason terminating record authors' access to the BHP, current and future data administrators or members of the symogih.org project appointed by the project directors will have the right to correct, update, or alter the authors' records with a view to ensuring the scientific nature and topicality of the information they contain. The name of the records' producer will, nevertheless, remain linked to the records.

In addition, the data administrators reserve the right to make any necessary alterations to the records produced by the current users with a view to ensuring their conformity with the symogih.org project standards.

The symogih.org project directors reserve the right to sign partnership agreements with other French or international scientific institutions with a view to improving and fully exploiting the database, while ensuring that the intellectual property of the records' authors and the principles formulated in these Terms of Use are fully respected.

The project directors undertake to guarantee that the information contained in BHP is freely available to symogih.org project members and that the section published online and as linked data is available to the public. Moreover, without assuming any form of responsibility in this regard, they will make every effort to avoid all abusive commercial use of the database and in the event of LARHRA closing down or any other circumstance jeopardising the activities and existence of the symogih.org project, solicit the CNRS or any other appropriate institution for the financial and material support needed to ensure long-lasting and free access to the BHP database.

The CNRS, LARHRA, symogih.org project directors, data administrators, and database administrators cannot under any circumstances be held liable for the loss of data introduced into the database caused by technical problems or halting of the symogih.org project, nor of their abusive use by other members or third parties. Information can only be added to the database free of charge and does not confer any rights relating to the project directors, data administrators, or database administrators.

Use of data produced in BHP

Licence for data published online
Data produced in the BHP and published online are subject to the
Creative Commons BY-SA 4.0 International licence (Attribution-ShareAlike)
as described here: https://creativecommons.org/licenses/by-sa/4.0/legalcode.

Use of knowledge units whose respective producers have authorised online publication
Symogih.org project members and external third parties have the right to use this data in compliance with the terms set out by the Creative Commons BY-SA 4.0 International licence and the author's moral right in accordance with articles L 121-1 et seq. of the French Intellectual Property Code.
It is good practice and complies with scientific ethics to inform the main producers about use of the data they have produced.

Use of knowledge units whose respective producers have not authorised online publication
As part of the pooling of data, a core principle of BHP, members of the symogih.org project and the symogih.org project's research groups have the right to use, for the purposes of scientific study or publication, knowledge units whose respective producers have not authorised online publication in compliance with the following conditions:

- If the quantity of knowledge units produced by the member or research group wishing to use data produced by other members is over 50% of the total knowledge units used in the research work:
  - the member or research group has the right to use the knowledge units produced by one or more other producers without prior permission if the quantity of knowledge units for each of these producers is under 20% of the total knowledge units used in the research work.
    It is good practice and complies with scientific ethics to inform the main producers about use of the data they have produced;
  - the member or research group has the right to use knowledge units produced by one or more other producers after getting permission from the producer(s) and, if one of the producers is no longer a member of symogih.org project, permission from at least two symogih.org project directors if the quantity of knowledge units for each of the producers is greater than or equal to 20% of the total knowledge units used in the research work.

- If the quantity of knowledge units produced by the member or research group wishing to use data produced by other members is under or equal to 50% of the total knowledge units used in the research work:
  - the member or research group has the right to use the knowledge units produced by one or more other producers after getting permission from the producer(s) and, if one of the producers is no longer a member of symogih.org project, permission from at least two symogih.org project directors if the quantity of knowledge units for each of the producers is greater than or equal to 20% of the total knowledge units used in the research work;

- the member or research group has the right to use the knowledge units produced by one or more other producers after getting permission from at least two symogih.org project directors if the quantity of knowledge units for each of the producers is under 20% of the total knowledge units used in the research work.

It is good practice and complies with scientific ethics to inform the main producers about use of the data they have produced.

Obligations for BHP users

1. Authors of any scientific study or publication who have taken information, even partially, from the BHP are required to indicate their source specifically and visibly (for example, in the preface of a book, first note in an article, etc.) using the following formula: symogih.org project, Base d'hébergement de projets (BHP), LARHRA UMR 5190, CNRS - University of Lyon.

2. Symogih.org project members are required to comply with applicable regulations on the processing of personal data in accordance with the consolidated version of Law 78-17 of 6 January 1978. In particular, it should be noted that, in accordance with CNIL resolution 2012-113 of 12 April 2012, "indexing by external search engines [external to public archives] of the first and last names of the people concerned is forbidden for a period of 120 years from the record date of the acts in question or the document dates" and that this ban is extended to 150 years from the document date for data "that indicate, directly or indirectly, people's racial or ethnic origins, political, philosophical or religious opinions, trade union membership, health situation, or sexual life" unless "the person concerned has given their express consent."

3. Symogih.org project members with a user account also undertake to provide scientific information in their records and indicate its source, correct mistakes, and add additional information proposed by other members of the symogih.org project in the comments area provided. In particular, this applies to records likely to be published online, either by choice (content, information, etc. domain) or on principle (historical objects domain).

   Once they have produced a thousand records (a record is composed of a main record that assigns an identifier to an entity as well as secondary records containing properties), at least half of which are covered by the content or information domain, these users will be designated *data producers* in the list of symogih.org project members published on the website: http://www.symogih.org/

4. Symogih.org project members have access to BHP as well as related tools and tutorials. They undertake not to divulge any processes or expertise relating to the design and development of the database.

5. Symogih.org project members undertake to reserve the account names and password assigned to them for strictly personal use only.

6. Each member of the symogih.org project receives a copy of the Terms of Use with their account and undertakes to sign it and respect the principles it lays out as well as those formulated in the regulations and other documents that will be introduced at a later stage with a view to ensuring, adapting, and detailing application of these principles. The act of accessing BHP implies a commitment to respecting the principles set out in these Terms of Use.

7. The management of access rights within a research group will be governed by an internal group agreement which guarantees respect for the principles set out in these Terms of Use.

8. Failure to comply with the undertakings described in these Terms of Use may result in exclusion from the symogih.org project.

Processing of your personal data

The information collected that concerns you will be processed and is destined for managing accounts and access to the BHP and its database.

Responsibles for the treatment are:
- members of the symogih.org project administration whose list is published in the Members section of the symogih.org website. The list is deemed valid on the day it is consulted.

For the following aim:
- creation of your account: user key, login, password. The password is encrypted in the database and known to you alone.
- management of your account: user key, login, given name, surname, e-mail, title, institution, account type, signed terms of use type.
- publication of the users list in the BHP: user key, login, give name, surname, e-mail.
- publication of the members list in the Members section of the symogih.org website : given name, surname, institution.
- management of the access log (BHP and its database) : login, IP address, timestamp.

The recipients of this data are:
- members of the symogih.org project administration: user key, login, given name, surname, e-mail, title, institution, account type, signed terms of use type.
- members of the symogih.org project: personal data published in the BHP users list.
- for all: personal data published in the Members section of the symogih.org website.

The duration of conservation of the data is:
- one year: data used for the access log.
- until the end of the symogih.org project: data used to create your account and to publish the users list on the BHP and symogih.org websites.

You have the right of access, of correction, of portability, or of removal of this data, or of a limitation of their processing. You can oppose the processing of your personal data and you have the right to withdraw your agreement at any time, by contacting one of the members of the project management whose list is published in the Members section of the symogih.org website.

You can also direct a complaint at a controlling body.

Signature of commitment to the symogih.org project

Application for admission as a member of the symogih.org project of:

- Ms: ☐ / Mr: ☐ (Tick the corresponding box)

- Given name:

- Surname:

- Title and institution:

- Email address:

- Type of account requested:

I certify that I have received and read a copy of the BHP Terms of Use, and I undertake to respect the principles of use defined in the version dated 1ˢᵗ May 2017.

Place/Date:

Applicant's signature:

Do not complete this section

- Admis le :

- Identifiant :

- Visé par :

- Signature :