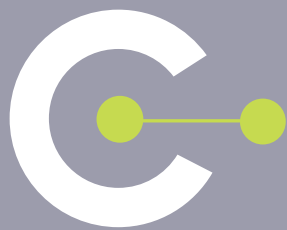


YOU
MAY
CONNECT.



USER GUIDE

CASD

USER GUIDE

You are authorised, or are in the process of authorisation, to work on confidential data which you will access from the Secure Data Access Centre (CASD). You will find in this guide all the necessary information to successfully implement your project and work within your secure environment.



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BEFORE ACCESS

Immediately upon obtaining your clearance from the competent accrediting authority designated by the data owner to which you wish to access, you may sign up for an "enrolment session." Due to the high level of security required for access to confidential data, this session is mandatory for any CASD access.

The standard enrolment session is organised every month and lasts about 3 hours. Registration for the session is done via our website, <https://www.casd.eu/en/your-project/seance-denrolement-2/>. Registration for each session will close one week before that session's date.

Each session consists of:

- > a description of the secure remote server
- > a demonstration of:
 - connection
 - work environment
 - methods of Import/Export
- > an orientation about security
- > a description of the legal framework for accessing confidential data, in particular any legal formalities that may be required
- > a presentation of standards of confidentiality (i.e. fiscal or statistical secrecy, etc.)
- > the issuing of a smartcard with a recording of your fingerprint signature. No biometric data is stored by CASD. Your fingerprint is only present as encrypted data on your smartcard (individual device)¹.
- > testing your connection

At this session, organised on CASD's premises², you will need to sign CASD's Terms and Conditions of Use. It encompasses all of the aspects of your use of CASD. All users involved in the same project, and wishing to have any access to data, are required to attend this session and sign this document.

The smartcard given by CASD is strictly individualized. You must not under any circumstances lend it or make it available to third parties.

A standard enrolment session, preceding all use of CASD, is considered valid for four years. **If you obtain authorisation for another project during your four-year validation, you may attend an "Express" enrolment session.** This shorter session excludes the orientation and informative sections and only consists of issuing you a new smartcard for your new project.

Beyond the four-year validation date, you will be required to attend a new standard enrolment session.

¹ | CNIL Ruling N°2014-369 of 25 September 2014 authorising to put in place the automated processing of personal data based upon a fingerprint biometric device, with the purpose of securing access to data available from the Secure Data Access Centre (CASD).

² | CASD cannot cover any travel costs related to enrolment session attendance.

DATA ACCESS

Access to data and to your secured work environment is done via a secure terminal called SD-Box™, by means of your individual smartcard (issued at the enrolment session) and biometric authentication.

01

Presentation and Installation of the SD-Box™

The SD-Box™ serves solely as the terminal for accessing our secure server: **data is not hosted on an SD-Box™**. All connections are done onto a virtual server dedicated by project.



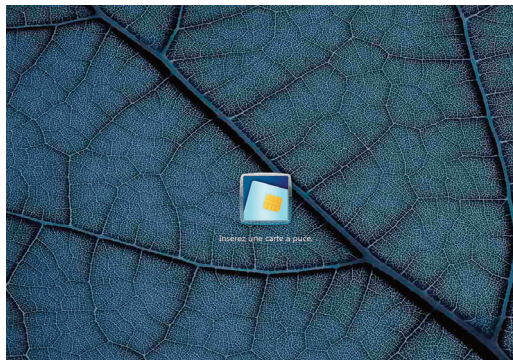
The SD-Box™ must be installed at the hosting institution declared during the contractualisation phase ([see Preliminary Contractualisation p.14](#)). Do not forget to notify your IT service of this installation, particularly in order to fill out the technical form available on CASD's site (<https://www.casd.eu/en/formulaire-technique/>). In order to use the SD-Box™, it is necessary to connect it to a network and hook up a screen, mouse and keyboard to it (all not-included).

Here are some rules for its physical installation:

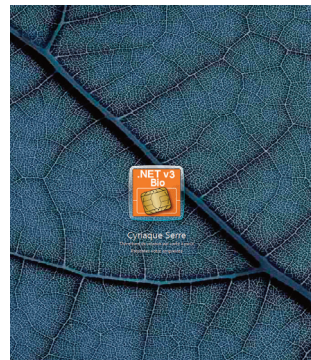
- always place it in a location that is locked and secured
- screen should only be visible to the user at all times
- no other device can be connected to the SD-Box™ apart from the screen, keyboard and mouse.

Connexion

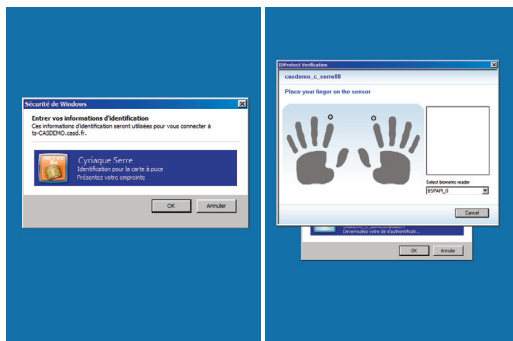
Your SD-Box™ must continuously be switched on. To start it up, press the button located on the back of the case. You may connect once the display unit on the SD-Box™ reads “You may connect”.



Please insert your smartcard into the device.



You have accessed the log-on screen; please place your finger on the SD-Box's™ fingerprint sensor to be identified (different interface according to the type of smartcard).



You have now accessed the authentication screen for your workspace; please place your finger once again on the fingerprint sensor to be identified for your workspace (different interface according to the type of smartcard).

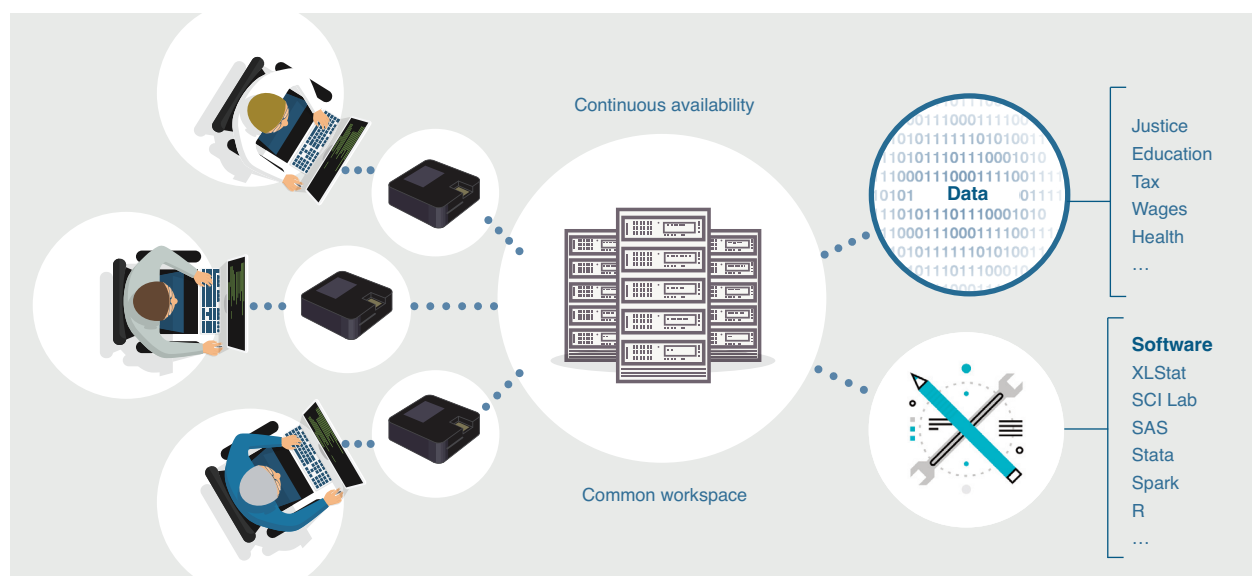


**Your session is strictly personal;
you must not give anyone else access to it.**

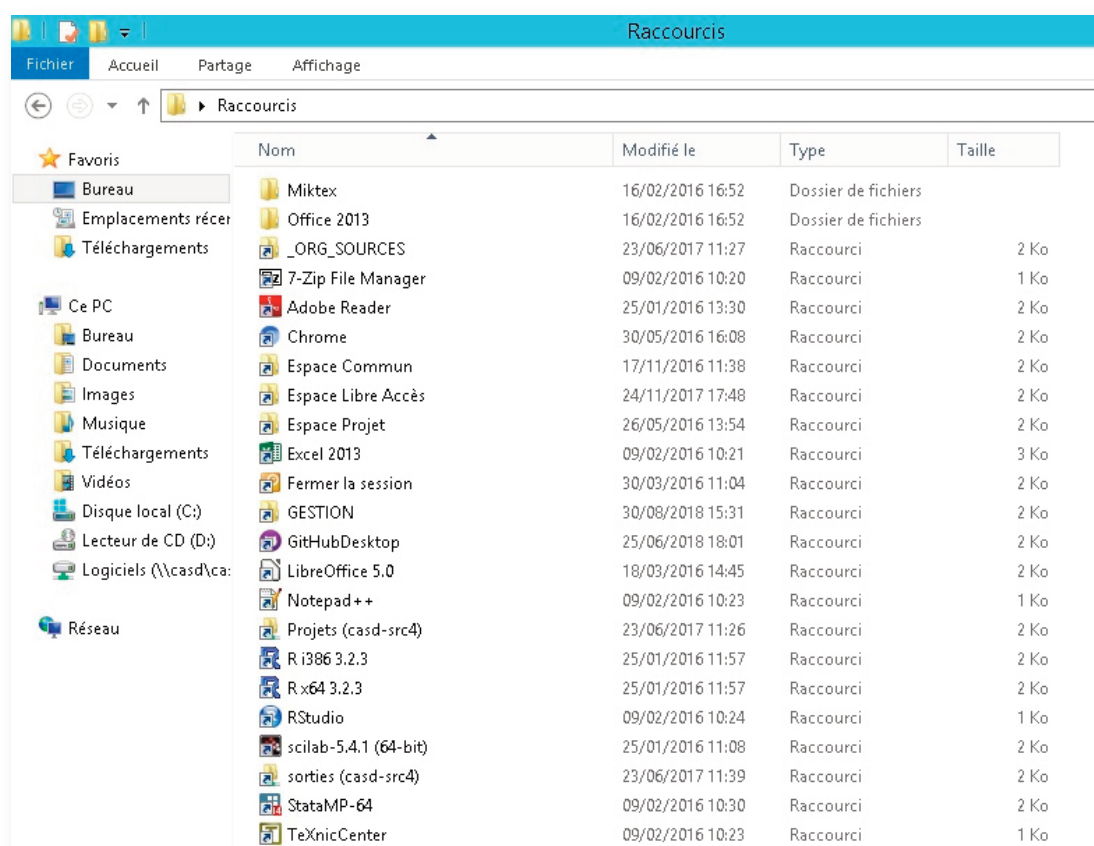
Troubleshooting

In the case of connection problems, or for any further instructions about the configurations of the SD-Box™, please consult the document given with the SD-Box™, or contact CASD by email at: service@casd.eu.

In case of loss or theft of your smartcard, please notify CASD immediately (see [Contact](#) p.16). You will need to personally come to CASD for a new card to be issued.

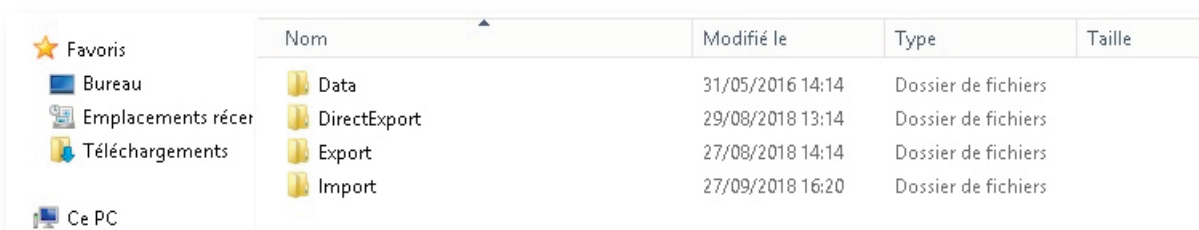


In your work environment, a “Shortcuts” folder is available on your desktop.



In addition to accessing the available software, your work environment allows you to access 2 different spaces:

- A **common workspace** for processing data and files created as part of your project (programs, texts, etc.). This workspace is accessible for all the members of your project.
- A **project area** that groups 4 directories:
 - “Data”: all data for which you are authorised are deposited in this directory. We recommend copying them to the common workspace of your project. All data to which you have been given access must never be used for any purpose other than those listed in the project for which you have been licensed.
 - “DirectExport”: the set of automatic exports requested (for reasons of traceability of extracted files from your environment, you don't have access to it. This concerns only some projects where authorisation for this was given by the data depositor).
 - “Export”: all the standard outputs requested are stored here (see [Exports](#) p.9 for the procedure for standard outputs). For reasons of traceability of extracted files from your environment, you do not have access to it.
 - “Import”: files that you wish to insert in your environment are placed in this directory in a folder using the current date (see [Imports](#) p. 9 for input request procedures).



Nom	Modifié le	Type	Taille
Data	31/05/2016 14:14	Dossier de fichiers	
DirectExport	29/08/2018 13:14	Dossier de fichiers	
Export	27/08/2018 14:14	Dossier de fichiers	
Import	27/09/2018 16:20	Dossier de fichiers	

The “Shortcuts” folder also allows you to access the “Libre Accès” folder in your work environment. It contains open data and codes retrievable such as:

- IGN GEOFLA database (Downloaded from data.gouv.fr)
- Sirene: register of enterprises and establishments – stocks on January 1st of each year (Downloaded from data.gouv.fr)
- Classifications: Geographical and NAF, NES, PCS, COICOP, CPF, CJ (Downloaded from insee.fr)
- SAS Macros Insee (CALMAR, CUBE, data analysis) (Downloaded from insee.fr)
- Information documents from CASD:
 - User guide
 - Confidentiality rules

To ensure the confidentiality of all data, it is impossible to:

- **recuperate data files in ways other than the specific procedure** (see [Exports](#) p.9)
- **print or do any "copy/paste" or "cut/paste"** (for outside of the work environment)
- **access the Internet from your work environment**

Your activity within CASD and the files that you make or introduce are your exclusive property and are covered by professional secrecy to which all CASD employees are subjected.

Available Software

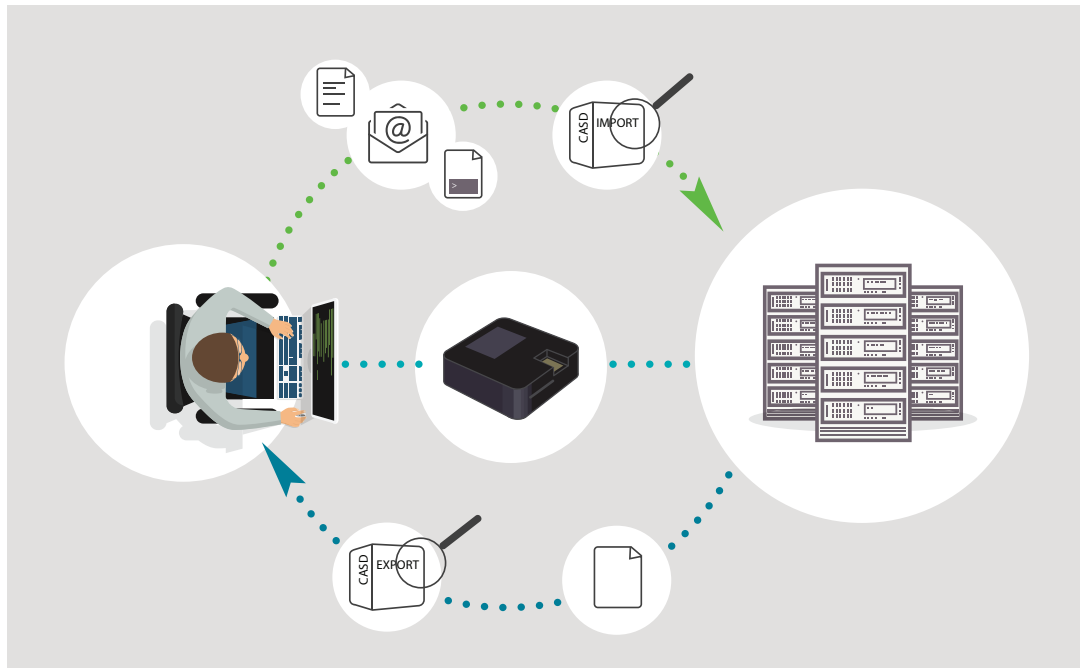
● Installed Software ● Optional

Software	Installation
7-zip	●
Adobe Reader	●
GeoDa	●
Ghostscript	●
GSView	●
Gvim	●
Libre Office	●
Microsoft Office	●
MikTeX	●
Notepad++	●
Philcarto	●
Python	●
Qgis	●
R	●
Rstudio	●
SAS	●
Scilab	●
SPSS	●
Stata	●
TeXnicCenter	●
XLStat	●

All software is available in the "Shortcuts" folder.

For the latest information concerning available software version, please consult the chart on this webpage: <https://www.casd.eu/en/technologie/environnement-de-travail/>.

To add software or ask for an update, as well as for all modifications to the material configuration of your work environment (defined during the contractualisation phase), please make your request by email at: service@casd.eu.



Imports

If you wish to work on files that are not currently within CASD (programs, documentation, or all other types of external data), it is necessary to ask for an Import to your workspace. **Importing of data in order to be joined to that which is already present at CASD is only possible if it was explicitly mentioned within your authorisation.** Only 'inactive' files can be imported (no executable files allowed).

Importing can only be done by the team at CASD. Send your files, along with a description (type of file, contents, source) by email to service@casd.eu or by file transfer. Please contact us if the volume of your files can't be sent by email.

Files are placed in the "Imports" folder of your work environment.

You will receive notification by email that the import has occurred.

Manual Exports

At certain stages of your work in your work environment, you may need to retrieve datasets of results (whether intermediate or final results). A specific procedure exists for this purpose.

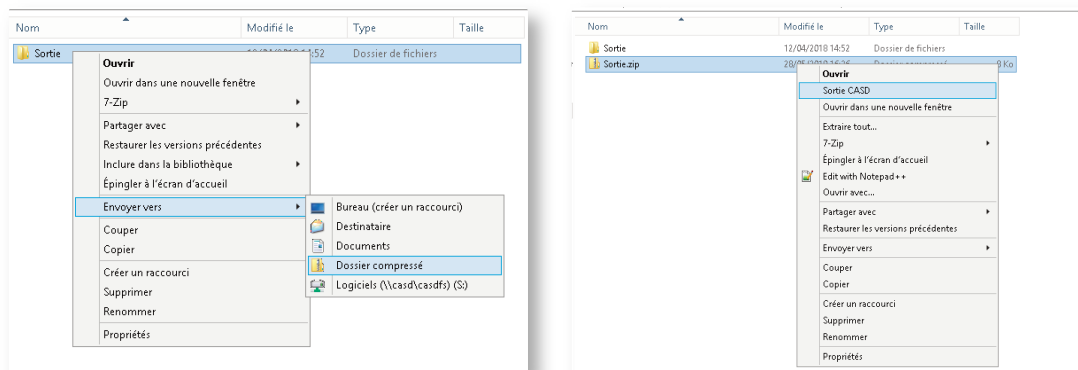
These datasets must meet all confidentiality policies from the data owner (statistical secrecy, fiscal secrecy, etc.). In general, the data contained in these datasets must not in any circumstance allow for direct or indirect identification of the person or company involved.

For more precise information on confidentiality policies, please refer to the documents given at the enrolment session and available on CASD website (https://www.casd.eu/wp/wp-content/uploads/Regles_de_confidentialite_sorties.pdf) or in the « Libre Accès » folder in your work environment.

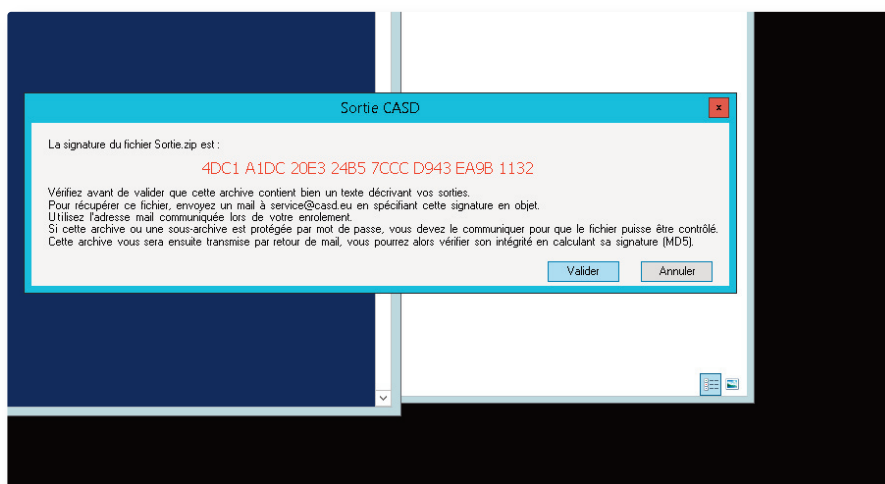
All manual exports are reviewed by CASD who may ask for modifications or specifications when needed.

Procedure for Exporting Files

- Insert all the elements that you wish to export into a folder that you've specifically created for this purpose, without forgetting to add the descriptive file that specifies the contents of the files you wish to export: tables, programs, dataset descriptors (clear names and meanings of variables)



- Zip the folder (.zip only)
- Right-click on the zipped folder and select "Sortie CASD" (CASD Output)



- Make note of the key that is displayed for reference (32 characters, only numbers and only letters A to F)
- Click on the "Valider" button to validate your export request.
- Finally, send your request by email to the team at CASD at this address: service@casd.eu. Your message has to contain the name of your project and the 32-character key given before validating.

CASD must be able to review the exported content without needing to ask you for more detailed information. CASD reviews the files and ensures that they do not contain any confidential data. Once the data export has been reviewed and matches the confidentiality rules, the CASD team will send it to you by email.

The average delivery time for exports is one to two working days. In case of complex or heavy exports, the delivery period may increase to five working days or more.

Inter-project Export

You also have the option to request a transfer of an export from one project to another (whether you are working on it or not). To make this export, do an export request as indicated in the previous point, and specify in your email you want to transfer it between two projects and mention the name of the projects. After the checking, the export will be directly transferred from one work environment to the other.

Be careful, in case the origin project of the export is authorised to data sources different from those of the receiving project, you will have to provide a detailed description of the files to be transferred. It will allow CASD to check if the export does not contain data for which the project receiving the export is not authorised.

Export Credit

When starting a project, you are given export credit, which is determined when the project is created (by default, 20 exports over the duration of your project, for a maximum of 3 years; please note that it is possible to ask for extra export credit packs). This export credit reflects the time CASD takes to treat a standard export request, which corresponds to 30 minutes of effective reviewing. A real export could require several credits or, conversely, a fraction of credit (if the export requires less than 30mn).

Your request for an export will only be treated if you have enough export credit the day you request it. If it is not the case, you will need to order an extra credit export pack by contacting service@casd.eu.

Automatic Exports

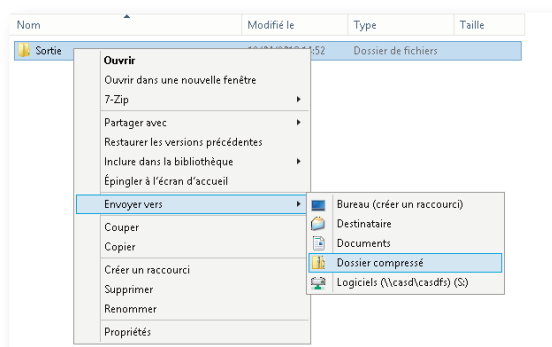
Some projects, mostly working on health data sources, have the possibility to request automatic exports. This is allowed by few data producers.

Procedure for Automatic Exports :

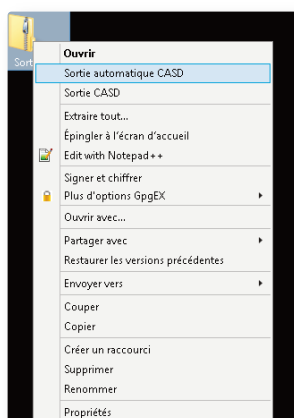
Pour réaliser une demande de sortie automatique, procédez de la manière suivante :

To request an automatic export, proceed as follows:

- Insert all the elements that you wish to export into a folder that you've specifically created for this purpose
- Zip the folder (.zip only)



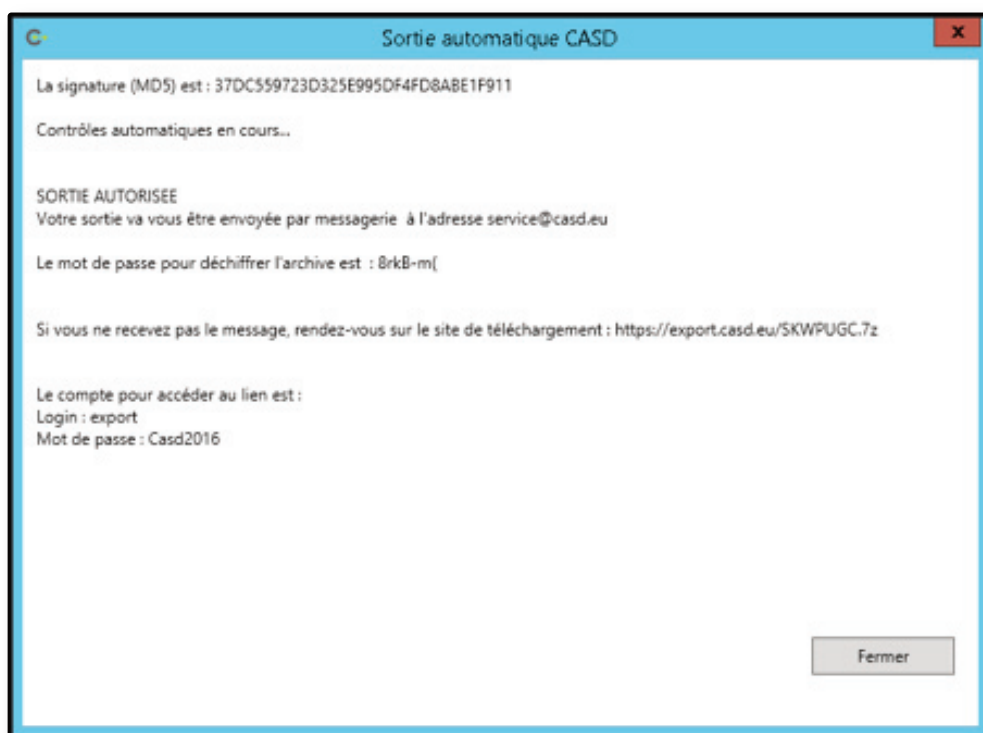
- Right-click on the zipped folder and select "Sortie automatique CASD" (Automatic CASD Output)



You will then be asked to fill out a form describing your export. On submitting this form, an automatic process will check your export (size and frequency criteria defined by data producers).

In a new window you will be shown the password to decrypt your export as well as the link to get it. You will receive this link by email but the password is only given inside your work environment. Make sure you write the password before closing the window.

Here is an example of window generated after an automatic export request:



The export is compressed in a 256-bit AES encrypted 7-Zip file. Once the system processes your request, the output is deposited on a web server available from the outside using HTTPS. If its size allows it, the output is also sent attached to an email.

To get your export, you will receive two emails:

- One containing the download link to your output file.
- A second one with the file attached, if its size allows it. The download link will be there again, as well as the identification information to access our web server on the Internet:

Login: export

Password: Casd2016

Finally, you will have to decrypt the zip file using the password given in the window inside your work environment.



Closing your Session

Two possible cases:

- You are done with your work session, with no ongoing calculations: click on “Close Session” in the “Shortcuts” directory on your desktop. Remove your smartcard from the card reader.
- You are in the middle of a calculation or need to leave your desk temporarily: remove your smartcard from the reader. Your session on the server will remain open. You will find it the way you left it when reconnecting, as previously indicated.

It is imperative to only use this last option when needed, as well as to close your server session in order to allow the server to be updated. Additionally this frees resources on the server.

PRELIMINARY CONTRACTUALISATION

Access to CASD services requires a preliminary contract agreement. The contract file contains, amongst others, the following 2 documents:

- **CASD Executive Service Agreement** signed by the legal representatives of the institutions involved in the project (including the financing institution and/or the institution hosting the access point)
 - A signatory institution will be able to issue Order Forms to fund your use of CASD and/or one (or several) SD-Box™ access points. It will, therefore, be referred to as the **"Financing Institution"**. The institution financing SD-Boxes™ can now be separate from the project-funding institution. There can be several institutions financing SD-Boxes™. However, there can only be one institution financing the services linked to one particular project.
 - A signatory institution will be able to issue SD-Box™ (access point to CASD) Hosting vouchers and will then be identified as the **"Hosting Institution"**. One institution can both finance the SD-Box™ and host it. Should you need several access points (which can be spread out in different buildings), you will need as many hosting vouchers as SD-Boxes™ that will be deployed (vouchers which will each need to be signed by the official host).
- **CASD Terms and Conditions of Use (TCU)**, signed by each member of the project, and regulating the different aspects of the **"Use of Service"**. There will therefore be as many TCUs as there are users.

These documents are accompanied by the following appendices:

- Pricelist of our services (also available at: <https://www.casd.eu/en/tarifs-2/>)
- If the building has never hosted an SD-Box™, the technical form to complete on-line to host an SD-Box™, available on our website (<https://www.casd.eu/en/formulaire-technique/>)
- Hosting Voucher(s) signed by the legal representative of the entity(ies) identified as the SD-Box™ "Hosting Institution"
- Order Form(s) signed by the officer authorised for expenditures by the entity identified as "Financing Institution" of your project and/or for an SD-Box™ access point preliminarily discussed with our services, taking into account your needs and the current pricelist.

To set up these contracts, contact CASD by email at: service@casd.eu.

In order to proceed with opening your access and shipping your SD-Box™, the documents listed above, along with the quote and order form corresponding to the financing institution (mandatory if it is a public entity), must imperatively be returned to us (by post, or email at service@casd.eu) properly completed, dated, and signed.

END OF A SUBSCRIPTION OR A PROJECT

01

End of a Subscription

At the end of a subscription, CASD will send you an Order Form for renewal. If you wish to renew, send us the following at our email address, service@casd.eu the Order Form fully completed, dated and signed, accompanied by either the order number of the financing institution, or its order form (which is mandatory if the financing institution is a public entity). **Be very careful that your authorisation includes this renewal period.** If not, it is necessary to ask for a prolongation of your rights to access data by the competent accrediting authority.

02

End of a Project

At the end of a project, you must return all of the project's SD-Boxes™ with their power supplies. In agreement with the CASD Terms and Conditions of Use, please remember that you have committed to destroying your personal smartcard.

CITATION OF DATA AND PUBLICATIONS WITH ACCESS FOR SCIENTIFIC RESEARCH PURPOSES

01

CASD Citation

If you have benefited from a subsidised rate (see pricelist <https://www.casd.eu/en/tarifs-2/>), part of this agreement is to mention the use of CASD in your publications as follows:

- "Ce travail a bénéficié d'une aide de l'Etat gérée par l'Agence Nationale de la Recherche au titre du programme Investissements d'avenir portant la référence ANR-10-EQPX-17 (Centre d'accès sécurisé aux données – CASD)" (French publications)
- "This work is supported by a public grant overseen by the French National Research Agency (ANR) as part of the 'Investissements d'Avenir' programme (reference: ANR-10-EQPX-17 - Centre d'accès sécurisé aux données – CASD) " (Other publications)

02

Information about Publications

When you have published results stemming from your work at CASD, we welcome you to indicate that via this on-line form: <https://www.casd.eu/en/share-a-new-article/>.

Furthermore, CASD contacts all of its users for an end-of-the-year registration of their publications using this form.

CONTACT CASD

Email: service@casd.eu

Telephone :

- Contracts and Billing (incl. renewals): +33(0)1 70 26 69 32
- Data, Enrolment, Import/Exports: +33(0)1 70 26 69 33
- IT: +33(0)1 70 26 69 34

Access point Hosting Voucher: designates the document indicating the agreement by the moral or physical signatory entity to host an SD-Box™ access point. The access point can be funded by this moral or physical entity, or by another moral entity with a contractual relationship to CASD.

Accreditation: decision made by the competent authority (data owner and/ or archives administration...) giving clearance to certain data within a project.

Biometric Reader: device equipped with a fingerprint sensor and an access card reader provided to the Hosting Institution by CASD.

CASD: designates the Secure Data Access Centre.

Contract: set of contractual documents signed by the parties, including terms and conditions, annexes, forms, and potential amendments.

Data: set of information for which CASD provides access to the User according to their clearance and to the CASD conditions of use.

Data owner: moral entity which entrusts CASD with data, to which the latter gives the User access via CASD, following the clearance procedure which has been defined by the data owner.
Export: exporting of non-confidential data completed by CASD upon request and under the responsibility of the User.

Export: exporting of non-confidential data completed by CASD upon request and under the responsibility of the User.

Express Enrolment Session: separate session for Users who have completed the standard enrolment session within the last 4 years where the User receives their new smartcard.

Financing Institution: title of the legal or natural entity, given that they are placing or have placed a minimum of one order for a CASD service. A Financing Institution can also be a Hosting Institution.

Financing Institution: title of the legal or natural entity, given that they are placing or have placed a minimum of one order for a CASD service. A Financing Institution can also be a Hosting Institution.

Hosting Institution: title of the legal or natural entity, given they emit or have emitted at least one access point hosting certificate. A host can also be a Financing Institution.

Import: integration of files provided by the User into their workspace by CASD.

Order Form: designates the document submitted by the Financing Institution to materialise the order. This document lists the services required by the financing institution. The Order Form constitutes a legal and financial agreement binding the Financing Institution.

Pricelist: document indicating the applicable rates, available on the CASD website.

Project: set of activities, completed within the CASD environment, by one or more directly and nominally identified Users on the data for which they received clearance and for the precise duration given with their clearance.

Project Extension: extension of a project's duration through the renewal of the initial authorisation, the subscription, and any related contracts.

SD-Box™: electronic device composed of a case and biometric reader, allowing access to CASD servers and rented by the CASD-approved Hosting Institution.

Smartcard: personal card provided by CASD allowing the User to prove their identity when connecting to the various CASD services for which they subscribed.

Standard Enrolment Session: training workshop conducted by CASD for Users in order to orient them to the various aspects including legal, IT, and security issues. Sessions take place at CASD. At the end of the session, the User receives their smartcard. Validation of a standard enrolment is four years.

Standard Export: export containing 1 table with 20 or fewer variables and 100 or fewer observations.

Technical Form: form available on the CASD website to be completed by the Hosting Institution.

casd.eu

CASD C