



Panel Data Research Center at Keio University

Data Management System (DMS) Manual

【For students*】

2020.4 Ver.1

* students are defined as undergraduate and graduate students (including postdoc)

The Panel Data Research Center at Keio University (PDRC) renewed the Data Management System (DMS) on April 2020

【Main changes】

- In the new system the data application process starts with the user registering a new project. Next, the user can register all participants of the project, including members that will handle the data. The analysis of the application and the data provision will happen just after all participants finish the registration process and accept the PDRC's agreement.
- When the user registering a new project is a student (undergraduate student, graduate student or postdoc) it is necessary to indicate a referee for the project. Please be aware that the referee will also need to register an account in the DMS.

Qualifications and requirements for data use

- The Panel Data Research Center at Keio University (PDRC)* provides microdata for nonprofit and academic purposes only. These microdata are provided to researchers, undergraduate and graduate students (including postdoc) affiliated with a university or research institutions.
- It is **mandatory to abide by the rules written in the pledge** when using the PDRC's microdata. Please give this pledge your utmost consideration and adhere to its requirements. Violation of any pledged items may lead to prohibitions on data use in the future.
- The microdata will be available to be downloaded from the PDRC's web-based Data Management System (DMS) once the data application process is completed and the request is approved. **There are no costs for using the data.**
- * Hereinafter referred to as PDRC

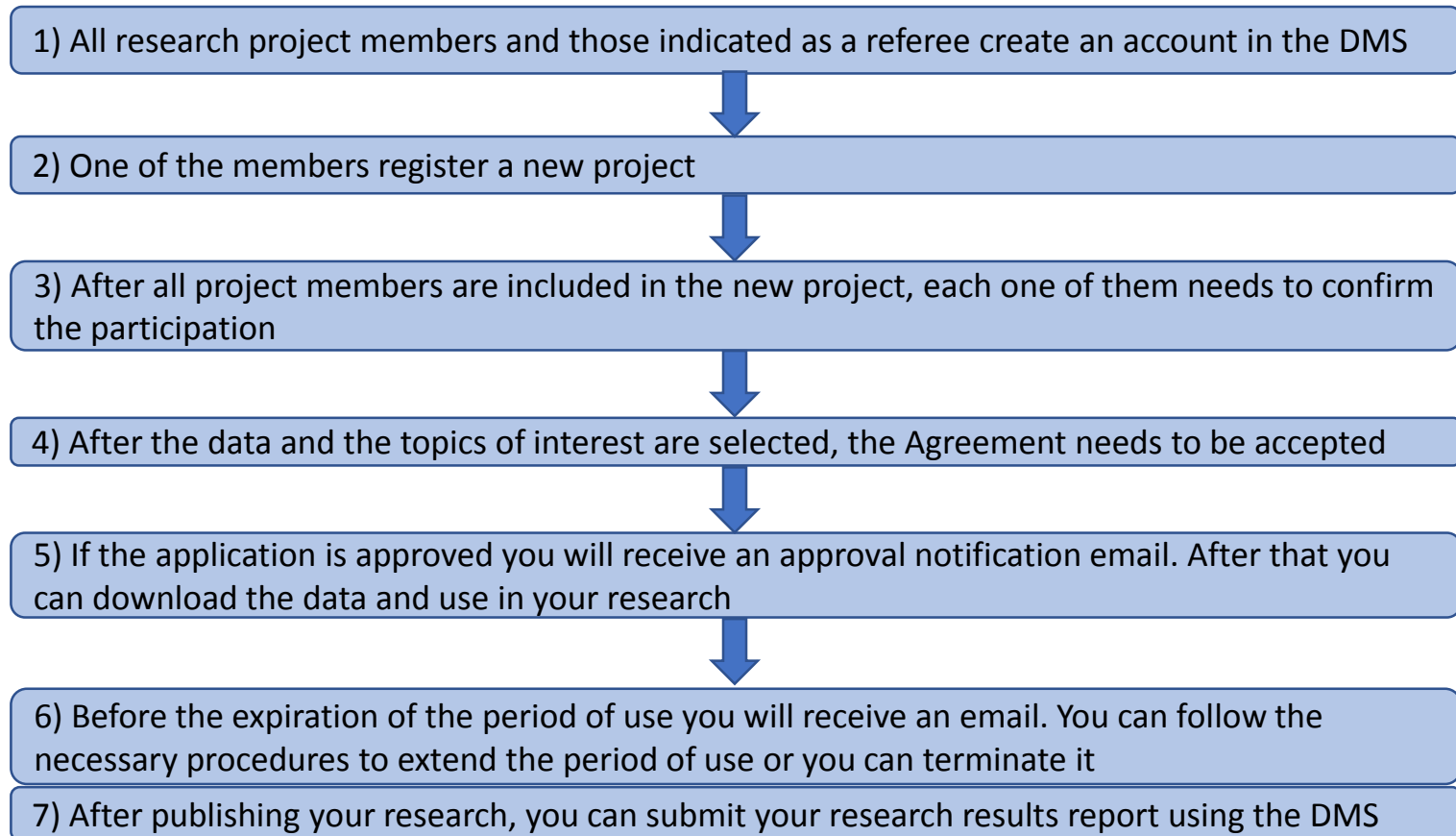
List of available data

- PDRC provides the following panel data (status on 30/8/2019).
- Please refer to the links below for details of each data.

Data	Researcher	Graduate student	Undergraduate
<u>JHPS/KHPS(2004-2017)</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>JCPS(2010-2013)</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>GEES</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>JPSC</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>JHPS-CNEF</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Data usage stages

The stages from the data request to the research results report are as follows:



Creating a new account

Those who wish to use the data (including all members of a joint research project) and those who will be indicated as referees need to create an account in the DMS.

Creating an account (English)

Create a new account

Name

First name Last name

Student

▼

※Please select one option: undergraduate/graduate/non-student

Organization

▼

※Please select either a university or a research institution

Organization name

Organization name

※Enter the official name that identifies the university or institution you belong to

Position

Position

※Example: Affiliated faculty, affiliated graduate school, affiliated department, professor, lecturer, researcher, etc.

- ◆ Name: First name and Last name.
- ◆ Student: based on your current situation, choose between undergraduate, graduate or non-student (if you are a postdoc, please choose graduate).
- ◆ Organization: select between university or research institution.
- ◆ Organization name: type the official name of your university or research institution.
- ◆ Position: please provide detailed information on your affiliated faculty, affiliated graduate school, affiliated department, and if you are a professor, lecturer, researcher, etc.

Postal code

Postal code

※Only numbers excluding hyphens

Address

Address

Cities where you will be using the data

Cities where you will be

Countries where you will be using the data

Countries where you will

Email address

Email address

Password

Password

☐ Show password

Verify password

Verify password

☐ Show password

【Agreement】

☐ I have read and agree to the qualifications and requirements.

Confirm your entry

Back to login

- ◆ Postal code and Address: provide an address where you can be contacted (can be your home address, organization address, etc.)
- ◆ Cities where you will be using the data, Countries where you will be using the data: indicate the place where you will be using the data.
- ◆ Email address: provide an email address where you can be contacted (**just one email address**).
- ◆ Password: enter at least 6 characters (if you would like to double-check what you inputted you can click on “show password”).
- ◆ 【Agreement】 After reading the qualifications and requirements please click on the checkbox if you agree with it.
⇒ After filling all the necessary information, please click on “Confirm your entry”.
- ⇒ After double-checking the provided information, click on “Register”.

Create a new account

Thank you for your account registration. In order to complete the process, please click on the URL on the email we have sent you.

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⇒ After clicking on “Register” you will see a notification screen informing that you will receive an email (upper left).

This is an automatically generated email by Panel Data Research Center at Keio University (PDRC), Data Management System (DMS).

Dear _____,

This is a message from the Panel Data Research Center at Keio University.
Please click the URL below and complete your registration.

<https://www.pdrc.keio.ac.jp/>

* This is valid for 1 day.

If you have any queries, please email to info@pdrc.keio.ac.jp.

Sincerely yours,
Panel Data Research Center at Keio University
URL: <https://www.pdrc.keio.ac.jp>
e-mail: info@pdrc.keio.ac.jp

*This is an automatically generated email. Please do not reply to it.

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⇒ You will receive on the email address you provided a message with the title 「KEIO_PDRC： Please complete your registration ユーザ登録用のURLをお送りします。」 (lower left).

Please click on the URL in the email body to complete the registration process.

* This registration URL is valid for only one day.

Creating a new project 【For students*】

* students are defined as undergraduate and graduate students (including postdoc)

Before creating a project

- Please be aware that **undergraduate students** applying for the Japanese Panel Survey of Consumers (JPSC) cannot have access to data on respondents' regional classification (both regional classification codes).
- **Please define a project referee before creating a project.** The project referee can be a professor with an academic administration position in your university (department head, dean, rector, etc.), your academic supervisor, or a member from the PDRC. Before creating a project it is necessary that the project referee creates an account in the DMS. Please contact your project referee and confirm the email address he/she registered in the DMS.

1. Creating a Project

* If you already have a registered project (including those projects registered in the old system), please go to page 17.



⇒ After login to the DMS, please click on “New Project” button inside “Project List”

(if you had registered a project in the old system, the past applications will be displayed in “Project List”. You can extend or re-apply for their use permission by clicking on them)

1. Creating a Project

Fill the necessary information in “Project Info”

 Project Info

Project Name(Research theme):

Please choose the most appropriate theme to explain your research.

Purpose of your research:

Please be as specific as possible about the purpose of the study and the expected results and significance.

* more than 100 words

Research proposal:

Please specify the research plan / method for achieving the research goal.

* more than 100 words

- ◆ Project Name (Research theme): choose a suitable title that describes your project.
- ◆ Purpose of your research: type the research objectives, the expected results and significance using more than 100 words.
- ◆ Research Proposal: specify the research plan and method for achieving the research goals using more than 100 words.

1. Creating a Project

Fill the necessary information in “Project Info”

Referee:

Please, provide a referee for your project.

The referee can be your supervisor or a professor providing advices in your research.

* Your referee must register an account in our system to follow the progress of your project.

Name of the Referee

Organization of the Referee

* Official name of the university

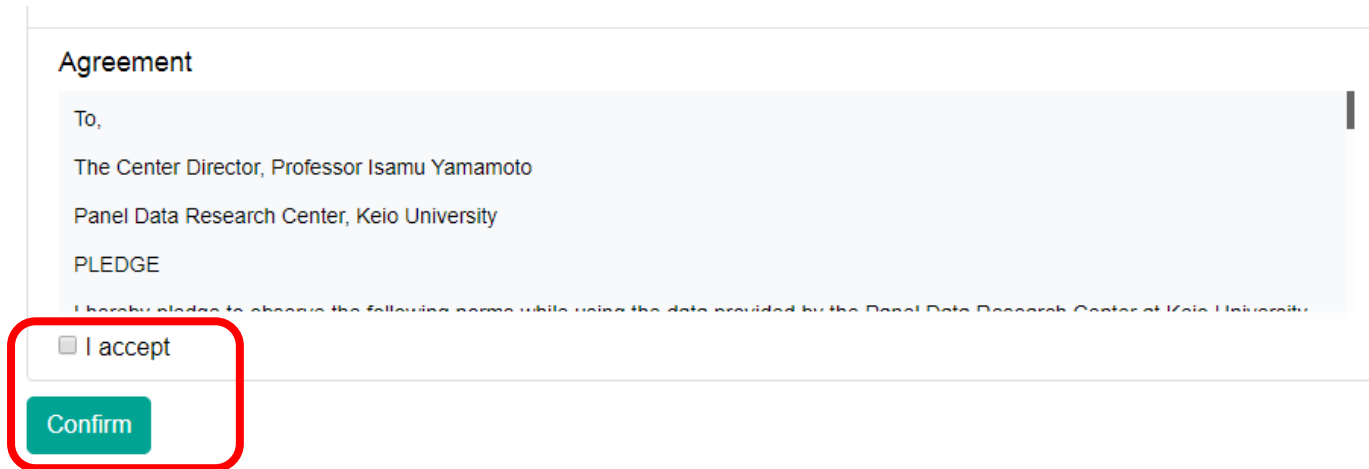
Email address of the Referee

◆ Project Referee:

- If one of the project members is an undergraduate or graduate student (including postdoc) it is necessary to indicate a referee.
- Please, fill out the referee's information (name, organization, and email address). The referee can be a professor with an academic administration position in your university, your academic supervisor, or a member from the PDRC.
- The PDRC will contact the referee by email. Please inform her/him beforehand.

*** The project referee must create an account in the DMS.**

1. Creating a Project



Agreement

To,

The Center Director, Professor Isamu Yamamoto
Panel Data Research Center, Keio University

PLEDGE

I hereby pledge to observe the following items while using the data provided by the Panel Data Research Center at Keio University.

☐ I accept

Confirm

⇒ **【Agreement】** After reading all the pledge, please click on the checkbox besides “I accept” if you agree with it. After that, click on “Confirm”.

⇒ After accepting the agreement and clicking on “Confirm” you will advance to a screen where you can double-check the information you filled.

It is mandatory to accept and follow the items described in the pledge if you would like to use the data provided by the PDRC. Please note that if you violate any of the pledges, you may be prohibited from using the data.

1. Creating a Project



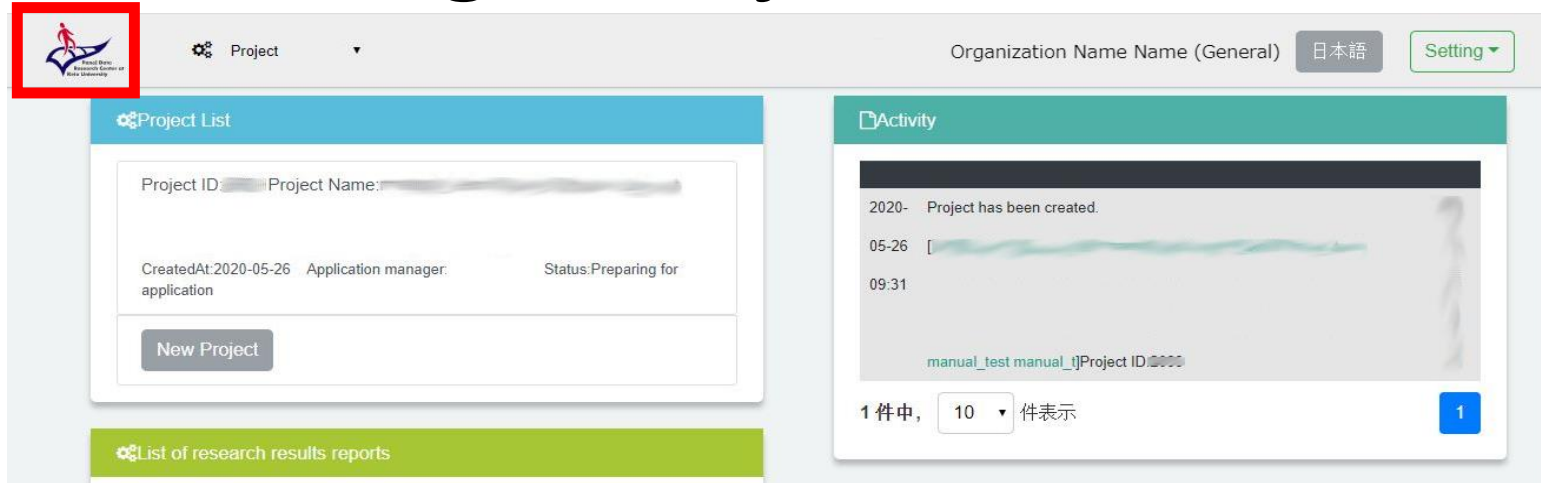
The screenshot shows a web form titled 'Referee:'. Below the title are three input fields: 'Name of the Referee:', 'Organization of the Referee:', and 'Email address of the Referee:'. At the bottom of the form are two buttons: a grey 'Back' button and a green 'Save' button. The 'Save' button is highlighted with a red rectangular border.

⇒ After double-checking the filled information, please click on “Save” to create the project.

* If you need to fix any filled information, you can click on “Back” and the system will move back to the “Project Info” page.

⇒ After saving the project you will advance to a screen where you will be able to add other members (to edit the project information, select the necessary data, or edit the project members you can click on the correspondent button on the toolbar).

1. Creating a Project



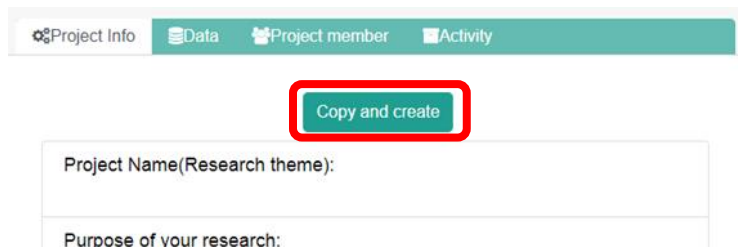
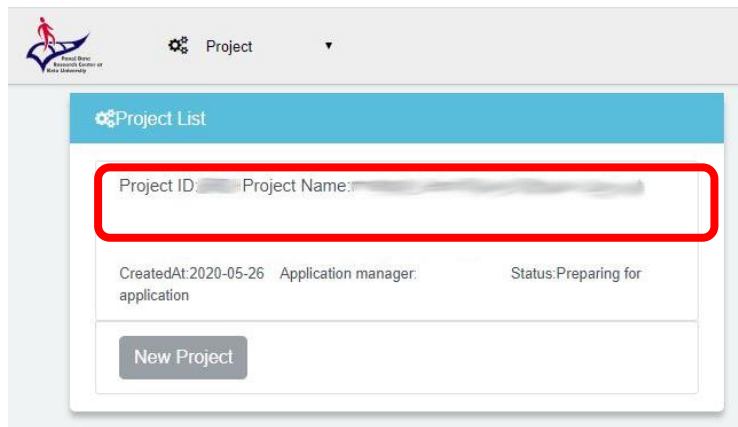
If you move back to the top page (click on the PDRC's logo on the upper left of the screen) you will be able to see in “Project List” the name of the projects you created. On the right side of the screen in the “Activity” box, actions such as the project creation, the project approval, etc., will be recorded.

If you want to edit the project contents, click on the appropriate project in "Project List" (the status is "Preparing for application") to display the project details. Click "Edit" at the bottom of the page.

*** You will not be able to edit a project after submitting the application.** If you need to change any content after submitting the application, please click on “New Project” or “Copy and create” button.

1. Creating a Project (reutilizing previous projects)

Those who have already applied for data use in the past can use the previous application contents to add a project (for cases of a completely different project, please create a new project)



- First, click on the existent project you would like to use as reference.
⇒ Next, in the “Project Info” screen click on “Copy and create”.
⇒ Confirm by clicking on “Yes” when the message “Copy the project. Is it OK?” appears.
⇒ After the message “Copied. Move to the copy destination” appears, you will be able to edit the project contents by clicking on "Edit" at the bottom of the page.
⇒ After doing the necessary changes in the contents, please click on “Confirm”.

For “Apply for project approval” and “Project member”, please refer to the next sections

2. Adding a Project Member

Application manager	User Name	Email	Organization name	Position	User type	Status
					General	Joined

Add project member

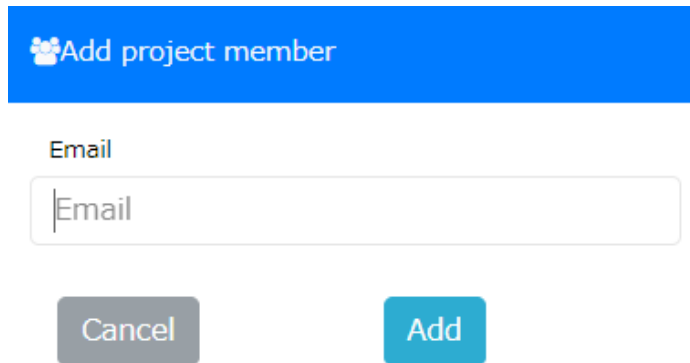
Apply for project approval

First click on the button “Project member”.

The name of the person who is creating the project (Application manager) will be displayed.

- **Individual research** ⇒ Check the contents and if there is no problem, please **click on “Data”** and choose the data you will use (if you already selected the necessary data, please click on “Apply for project approval”).
- **Joint research (more than one project member)** ⇒ Click on “Add project member” and follow the necessary procedures to add the participants.

2. Adding a Project Member (Joint Research case)

A screenshot of a web form titled 'Add project member' in a blue header bar. Below the header is a text input field with the placeholder text 'Email'. At the bottom of the form are two buttons: a grey 'Cancel' button and a blue 'Add' button.

- **Type the email address of the member you would like to add ⇒ click on “Add”**

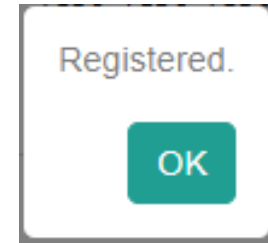
*** The member you would like to add must also create an account in the DMS. Please double-check the registered email address beforehand.**

- **If the member still do not have an account, DMS can send an invitation to the indicated email address.**
- The DMS will send a message to the indicated email address with the following title: 「KEIO_PDRC：Panel Data joint research パネルデータ共同利用（研究）について」. After receiving this message the new member will login on the DMS, check the project contents, accept the “Agreement”, and click on “Join”.

*** If the invited participant would not like to join the project, he/she can click on “Refuse”.**

2. Adding a Project Member (Joint Research case)

- After clicking on “Join”, the status of the invited participant will change to “Joined”.
- **After the status of all invited members change to “Joined”, and the necessary data were selected, please click on “Apply for project approval” on the lower left of the screen.**
- **⇒ The message “Registered” will appear.**



* If one of the invited members refuse to participate in the project, it will not be possible to click on “Apply for project approval”. In this case, click on “Delete” button besides the name of the member and then click on “Apply for project approval”.

2. Adding a Project Member

- A message with a title 「KEIO_PDRC： Notice of project application プロジェクト申請受付のお知らせ」 will be sent to the applicant's registered email address.
 - The person indicated as the project referee will receive a message with the title 「KEIO_PDRC： Approval Request - Your student applied for our data. 推薦依頼 - 学生がプロジェクトを申請しました」. Please ask the project referee to check the contents and then click on “Approve” if he/she agrees.
- * Please contact the project referee in advance.
- * If the referee reject the project application, a notification email will be submitted.

3. Selecting the necessary data

The screenshot shows a web interface for a research center. At the top left is the logo of the Faculty of Science, Research Center of the University. To its right is a toolbar with a 'Title' dropdown menu. Further right are buttons for '日本語' and 'Setting'. Below the toolbar is a main content area with a teal header bar containing four tabs: 'Project Info', 'Data', 'Project member', and 'Activity'. The 'Data' tab is currently selected and highlighted with a red box. Below the tabs is a table with three columns: 'Data ID', 'Data Name', and 'Comment'. The table is currently empty, showing '(レコードなし)' (No records). Below the table is a button labeled 'Add data', which is also highlighted with a red box. At the bottom of the interface is a green button labeled 'Apply for project approval'.

Select the applicable project from the toolbar on the upper left side, then **click on the button “Data” ⇒ Click on “Add data”**.

* You can request more than one data per project. Click on “Add data” ⇒ After selecting the data and filling out the necessary information, please click again on “Add data” and repeat the process to include another data. All the selected data will be displayed on the list.

3. Selecting the necessary data



Data usage request

General Data

Data ID	Data Name	Comment	
158	JHPS/KHPS2004-2018_OA	【NEW】 Japan Household Panel Survey 2004-2018_Open Answer (日本家計パネル調査 自由記入項目) ■file size: 5.66 MB ■update: 2019/12/10 [Japanese language only]	Select
157	JHPS/KHPS2004-2018_investigators	【NEW】 Japan Household Panel Survey 2004-2018_Investigators data (日本家計パネル調査 調査員確認票) ■file size: 8.85 MB ■update: 2019/12/10	Select
156	JHPS/KHPS2004-2018	【NEW】 Japan Household Panel Survey 2004-2018 (日本家計パネル調査) ■file size: 220 MB ■update: 2019/12/10	Select

On “General Data”, please click on the “Select” button on the right side of the data you would like to use.

* “General data” shows the data available to all project members. Please be aware that the available data list may change depending on students participation in the project. As mentioned before, if students participate in the project, only data available to undergraduate students will be displayed.

3-2. Completing the data request forms

◆ Applying for JHPS/KHPS2004-2018

Add data

Data Name: JHPS/KHPS2004-2018

Sections you plan to use:

* Please, choose the sections you plan to use. If there is no applicable option or if you are not sure which one to choose, select "Other".

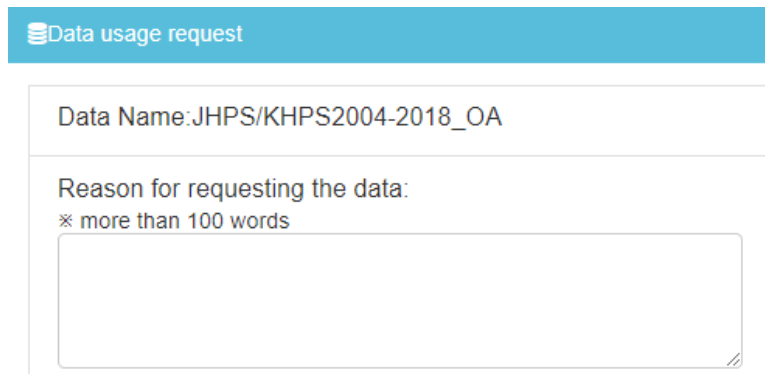
- | | | |
|--|---|--|
| <input type="checkbox"/> 家族 / Family | <input type="checkbox"/> 両親 / Parents | <input type="checkbox"/> 就学状況 / Schooling |
| <input type="checkbox"/> 就業 / Employment | <input type="checkbox"/> 幸福観 / Happiness | <input type="checkbox"/> 将来のことや不確実な事柄 / Future and uncertain matters |
| <input type="checkbox"/> 健康 / Health | <input type="checkbox"/> 子や孫への信託制度 / Intergenerational transfer | <input type="checkbox"/> 社会保険 / Social insurance |
| <input type="checkbox"/> 介護・障害 / Care and disability | <input type="checkbox"/> 生活時間 / Use of time | <input type="checkbox"/> 生活満足度 / Life satisfaction |
| <input type="checkbox"/> 相続・生前贈与 / Inheritance and advancement | <input type="checkbox"/> 私的年金・金融リテラシー / Pensions and financial literacy | <input type="checkbox"/> 預貯金・借入金 / Savings, assets and liabilities |
| <input type="checkbox"/> 収入 / Income | <input type="checkbox"/> 支出 / Expenditures | <input type="checkbox"/> 保険 / Insurance policies |
| <input type="checkbox"/> 住宅 / Housing | <input type="checkbox"/> 住宅ローン / Mortgage loans | <input type="checkbox"/> Other |

Please, select the sections of the survey questionnaire you plan to use. If there is no applicable option or if you are not sure of which one to choose, please select "Other" and identify the specific question in the displayed entry field (include details such as JHPS or KHPS questionnaire, survey year, page number, question number, question text, etc.)

* Sample questionnaires are available on our homepage. For JHPS/KHPS questionnaires: <https://www.pdrc.keio.ac.jp/paneldata/datasets/jhpskhps/>

3-2. Completing the data request forms

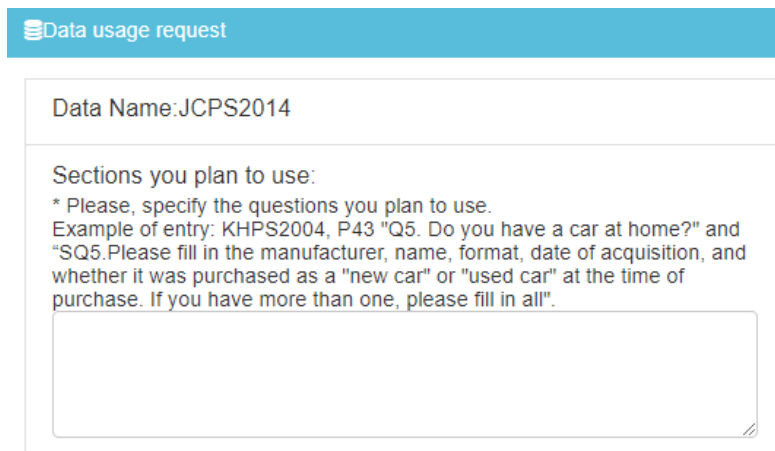
- ◆ Applying for JHPS/KHPS complementary surveys (investigators, OA, etc.)



The screenshot shows a web form titled "Data usage request" in a blue header. Below the header, there is a section labeled "Data Name: JHPS/KHPS2004-2018_OA". Underneath, it says "Reason for requesting the data:" followed by a note "※ more than 100 words". A large, empty text box is provided for the user to enter their reason.

Please specify the reason for using the data
* More than 100 words

- ◆ Applying for other data: JCPS, GESS, JPSC, etc.

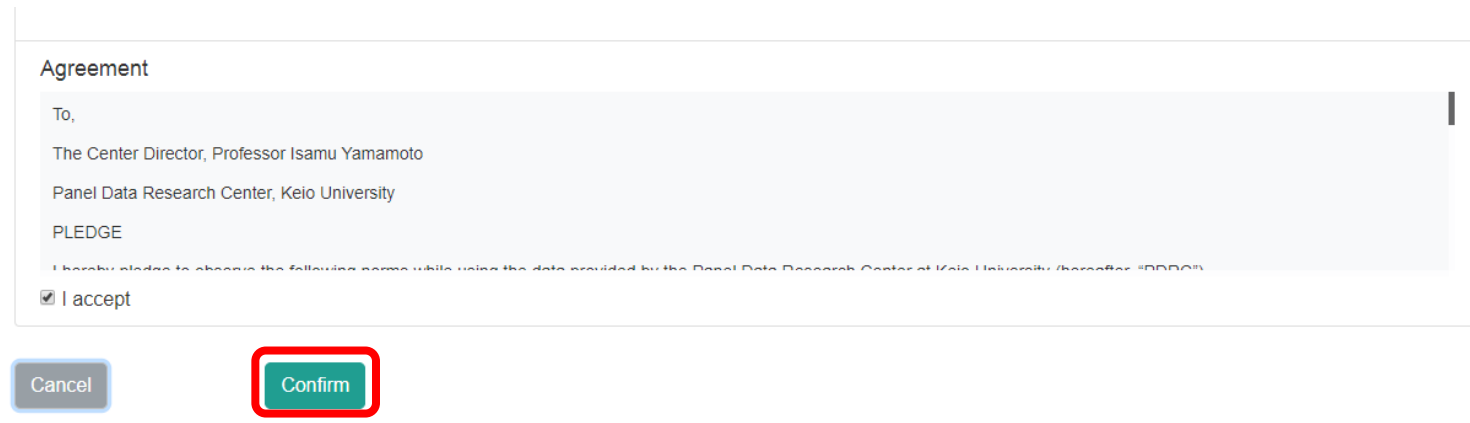


The screenshot shows a web form titled "Data usage request" in a blue header. Below the header, there is a section labeled "Data Name: JCPS2014". Underneath, it says "Sections you plan to use:" followed by instructions: "* Please, specify the questions you plan to use. Example of entry: KHPS2004, P43 'Q5. Do you have a car at home?' and 'SQ5. Please fill in the manufacturer, name, format, date of acquisition, and whether it was purchased as a 'new car' or 'used car' at the time of purchase. If you have more than one, please fill in all'." A large, empty text box is provided for the user to enter their request details.

Please, identify the specific questions
(include details such as survey year, page number, question number, and question text)

3-2. Completing the data request

◆ Agreement



The screenshot shows a web form titled "Agreement". Inside the form, there is a text area containing the following text: "To, The Center Director, Professor Isamu Yamamoto Panel Data Research Center, Keio University PLEDGE I hereby pledge to observe the following norms while using the data provided by the Panel Data Research Center at Keio University (hereafter "PDRC")." Below the text area, there is a checkbox labeled "I accept" which is checked. At the bottom of the form, there are two buttons: "Cancel" and "Confirm". The "Confirm" button is highlighted with a red rectangular border.

【Agreement】 After reading the pledge, please check the checkbox besides “I accept” if you agree with it. After that, click on “Confirm”.
⇒ After accepting the agreement and clicking on “Confirm” you will advance to a screen where you can double-check the information you filled. If the information is correct, please click on “Apply”.

4. Downloading the data after a project approval

- After a careful analysis, if your project is approved you will receive an email with the following title: 「KEIO_PDRC : Notice of project approval プロジェクト承認のお知らせ」.

⇒ Login to the DMS and check if the status of the registered project changed to “In Use”.

⇒ Click over the project name and then click on “Data”.

⇒ Click on “Download” to obtain the data.

4. Downloading the data after a project approval

The screenshot shows a web interface with a teal header bar containing five tabs: 'Project Info', 'Data', 'Project member', 'Research Result', and 'Activity'. The 'Data' tab is highlighted with a red rectangular box. Below the header is a table with three columns: 'Data ID', 'Data Name', and 'Comment'. The first row of the table contains the following information:

Data ID	Data Name	Comment
156	JHPS/KHPS2004-2018	【NEW】 Japan Household Panel Survey 2004-2018 (日本家計パネル調査) ■file size: 220 MB ■update:2019/12/10

To the right of the table, there are two buttons: 'Download' and 'Detail'. The 'Download' button is highlighted with a red rectangular box.

⇒ Click over the project name and then click on “Data”.

⇒ Click on “Download” to obtain the data.

* It is possible to download the data more than one time if you do it during the period of use.

* Only members of the project are allowed to download and use the data.

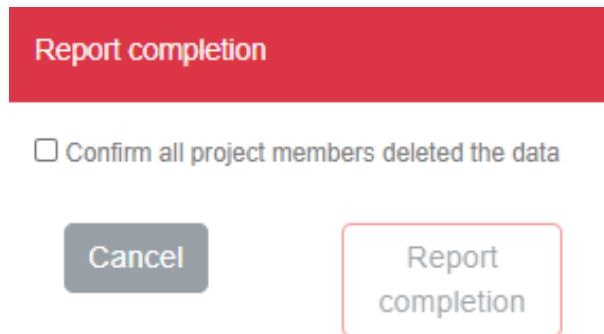
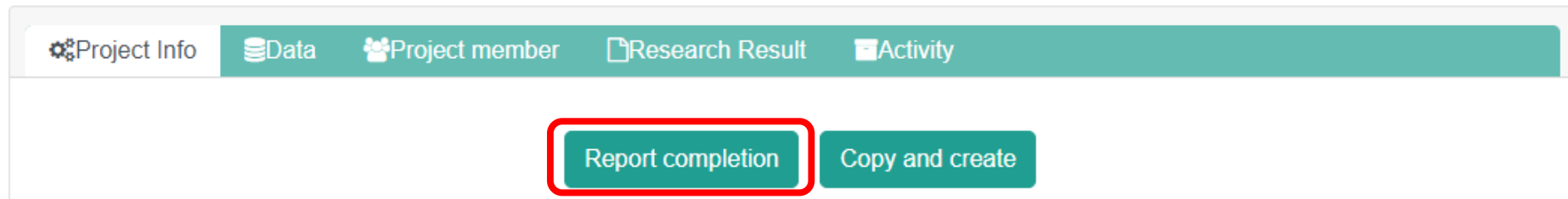
4. Downloading the data after a project approval

- Please inform the PDRC if you find any mistakes in the provided data and materials.
- Users are responsible for any data interpretation beyond the information available on the homepage and related materials contained in the downloaded files.
- Please, be sure to clearly state that you received the data from the PDRC when presenting or publishing your research results in academic journals, academic societies, media articles, etc.

(Example)

The data for this analysis, Japan Household Panel Survey (JHPS/KHPS), was provided by the Panel Data Research Center at Keio University.

5. Data use expiration and report of research results



If the permitted period of use expires (31st March for students and one year after the approval date for non-students) or if the project finishes before the termination of the data use period, it is necessary to report the project completion.

In “Project Info” click on the applicable project and then click on “Report completion”.

⇒ After confirming that all members deleted the downloaded data check the box besides “Confirm all project members deleted the data”.

⇒ Click on “Report completion”.

5. Data use expiration and report of research results

The screenshot shows a web interface with a teal header bar containing five tabs: 'Project Info', 'Data', 'Project member', 'Research Result', and 'Activity'. The 'Research Result' tab is selected. Below the header, there is a table with three columns: 'Report ID' (with a dropdown arrow), 'Registration date' (with a double-headed arrow), and 'Report Title' (with a double-headed arrow). The table body is empty, showing the text '(レコードなし)' (No records). Below the table, there is a button labeled 'Add Research Publication Report'.

Research results can be reported before or after the permitted period of use expires.

* Please be aware that if no research result is reported you may not be able to apply for data use on the next occasion.

To report the research results first click on "Research Result" ⇒ Click "Add Research Publication Report".

* To report multiple results, please fill the information and report one publication per time. After reporting the first case, please click again on "Add Research Publication Report" and enter the details for the next one.

5. Data use expiration and report of research results

Research Publication Report

Status of your research:

- ☐ Published
- ☐ In progress

no file selected

- **For published researches**
 - ⇒ Choose “Published”
 - ⇒ Click on “Choose File”
 - ⇒ Upload your publication (PDF file)
- **For researches in progress**
 - ⇒ Choose “In progress”

5. Data use expiration and report of research results

Author(s):

Title:

Type of publication:
☐ Academic journal (refereed)
☐ Academic journal (non-refereed)
☐ Conference report
☐ Dissertation
☐ Other

Title of the media that published your research (journal title, book title, etc.):

URL of the publication:

Publication date (actual or expected):

Abstract:

[Research report list](#) [Confirm](#)

- Author and Title: enter the information exactly as in the published work.
 - Type of publication: check the one that applies.
 - Title of the media that published your research (journal title, book title, etc.): type the media official name.
 - URL of the Publication: enter the URL of your publication if the media has a web version.
 - Publication date (actual or expected): select month and day on the calendar.
 - Abstract: type the abstract (if the PDF file already has an abstract this field can be omitted).
- ⇒ Click on “Confirm”.
- ⇒ After double-checking the contents click on “Submit”.

5. Data use expiration and report of research results

Notes :

- Please fill in all fields on the form when reporting research results and use one form for each publication. You may skip the "Abstract" field if the submitted copy of your research (PDF file) already has an abstract.
- Please fill in "Abstract" if your research is in progress.
- Please fill in "Abstract" if you do not have any documents to submit.
- It is possible to report research results even after the permitted period of use expires. Please, report your research result each time you publish a new work. Please, be aware that if you do not report research results, you may not receive approval to use the PDRC's data in the future.

If you have any question or doubt, please feel free to contact us on the PDRC's homepage or our email address below.

Panel Data Research Center at Keio University

<https://www.pdrc.keio.ac.jp>

info@pdrc.keio.ac.jp