

Q&A Report: OA Switchboard Webinar Reporting Made Easy (31 March 2021)

#	Asker Name	Question	Answer(s) from various panelist:
1	Kaveh Bazargan	Any chance of having PIDs for individual grants?	We have a data field for grant ID. For now it is free text. We follow what Crossref does and the funders, as Katharina Rieck mentioned.
2	Robin Sinn	Reporting is at the article level. Does that mean an institution will receive a report on articles with corresponding authors from their institution? Or any contributing author from their institution?	The report contains articles that are either in scope for an existing deal ("prior agreement") or charged to your institution ("no prior agreement"). In practice this mostly relates to the corresponding author, but it is the publisher who decides the business rules, who to send a message/report to.
3	Markus Putnings	<p>A question for the funders:</p> <p>From my point of view, the free text inclusion of acknowledgements in publications is always a bit problematic.</p> <p>Are there any thoughts to *enforce* more structured identifiers for both the funder (e.g. funder IDs - cf. CrossRef Funder Registry - https://search.crossref.org/funding) and the grant in publication metadata?</p> <p>For the latter, I am thinking e.g. of similar requirements like in OpenAIRE (https://guidelines.openaire.eu/en/latest/literature/field_projectid.html). There is a specific "syntax": Funder/FundingProgram/ProjectID/Jurisdiction/[ProjectName]/[ProjectAcronym].</p> <p>In the end, monitoring can only work in the long term if something like this can be implemented on the part of the publishers.</p> <p>...Sorry, that was a long question :-)</p>	Speaking as a publisher, I see this one of the value added services publishers can perform. While training authors on applying standards is a worthy goal, publishers should assist with this and help authors find the correct IDs and adjust formatting as part of the XML production process. So my hope would be that we can attack the problem on multiple fronts: industry agreement on standards, training and visibility for authors, and publishers as the ultimate backstop for metadata quality.
4	Kevin Symonds	Doesn't this rely on ALL publishers being involved though? You can't have information coming through on one system and a large chunk of your papers not being reported on the same system because other publishers you publish with don't use it.	Ideally, yes, but not needed. What you describe is actually the current situation: a myriad of systems and portals and processes. What we aim for is a step of improvement to today's situation, where all data/reports are different. We expect output of OA Switchboard to be fed into other systems for further analysis / processing. At least for the participating publishers you'll get it all in the same (de facto) standard format via the OA Switchboard.
5	Nicole Loorbach	This would save our (VSNU/UKB) university a lot of effort and time and give us so much insight. Yvonne, you said that some messages have already been developed. Can you estimate when institutions will start receiving them?	Hi Nicole, for the publishers who are live, today! But you'll need an account. Please get in touch, as UKB/VSNU made a similar arrangement as the one mentioned by Frank Manista for Jisc.
6	Robin Sinn	Thanks Ivo. So the Switchboard is built primarily to track articles associated with an APC payment or a RAP/transformation agreement. It's not currently looking at S2O or the PLOS CAP model. Is that a good characterization?	Ivo: "prior agreement" covers all types of deals including S2O, R&P, diamond and others. But probably Yvonne is the better person to share all those details. Yvonne: OA Switchboard is business model agnostic, so can support all models you mention, also if no financial settlement done at article-level. Some of the publishers live do actually use it already for reporting to institutions on their S2O arrangements. We have a Working Group on 'Diamond' to discuss how to support this model, and have not found any omissions in the data model nor message structure. We're now looking at how to support diamond with an automated solution via OJS integration.
7	Kevin Symonds	Ivo, if you have one author that has a OA mandate to fulfil who is not the corresponding author and none of the others do (or have a 12 month embargo whereas ours would have a 6 month embargo requirement so requiring Gold OA), then that author will need to be sent the invoice information as well. That is what is done when the corresponding author tells the publisher who to send the OA invoice to. It can't always be automatic.	Hi Kevin, the business rules that determine which institution to send the message to are on the side of the publisher, not part of the OA Switchboard.
8	Wendy Newsham	Does anyone have experience integrating OA Switchboard with ScholarOne and Atypon?	Atypon: yes
9	Kevin Symonds	Is the aim of funders to utilise the data transmitted through the OA Switchboard to replace reporting systems such as Researchfish?	live answered
10	Robin Sinn	'+1 to Kevin's remark about getting all/most of the publishers onboard. How much will OA Switchboard functionality overlap with what oable is talking about? oable seems narrower?	live answered
11	Valerie McCutcheon	As research organisations would need to change their processes and invest time in getting set up do we have an example of a research organisation who has already used the system and can share how this has helped them?	To obtain the aggregated messages in a report on the institutional side, our experience so far is that no set-up or development is needed. The Excel and JSON reports via the OA Switchboard just replace the reports received so far from the participating publishers. (changed processes or set-up is likely to be needed, if the receiving institution wants to receive message-by-message via a webhook in their own systems. Also, for other type of messages than P1, like E1, as these involve a workflow and a response from the institution to the publisher).
12	Frank Norman	How many publishers do you expect to have on board by the end of the year?	live answered
13	Kaveh Bazargan	Thanks Katharina for response to Grant ID. Sounds brilliant and sorry I was not listening closely enough. :-)	
14	Frank Norman	Kaveh - Wellcome are interested too. See https://www.crossref.org/blog/wellcome-explains-the-benefits-of-developing-an-open-and-global-grant-identifier/	
15	Laura Buchan	To follow on from Wendy's question, does anyone have experience integrating OA switchboard with eJournalPress?	Not yet