Open Access is opening research up to the world. Academics, institutions, funders, and publishers are committed to ensuring that research is accessible to all.
Research funders and institutions are expanding requirements. OA business models become complex and diverse. How do stakeholders navigate the OA research and publishing model?
The OA Switchboard is a mission-driven, community led initiative designed to simplify the sharing of information between stakeholders about OA publications.
It provides a practical tool: central information exchange hub...
Resources

Lessons Learned to Make Reporting Easy:
source data, PIDs, interoperability and a simple messaging tool

Recording of this 23 March 2022 webinar is here. The full slide deck is here.

How to log in and retrieve your Excel/JSON reports

Quick Reference Card “How to log in and retrieve your Excel/JSON reports” available here.

“Smart matching” enabled by ROR API

Iva Verbiček from our tech partner shares how OA Switchboard uses smart matching enabled by the ROR API to identify author affiliations. Presented at the ORG Community Meeting (February 2020), watch the full presentation here. Open source code is here.

Matching Publication Costs with Publication Funds

1. Infographic here: Needs of research funders, institutions/libraries and academic publishers
2. Infographic here: Matching article fund charges with publication funds via Digitally Enquiries messages
3. Infographic here: How can stakeholders connect to the OA Switchboard
4. Video animation here: Learn what the OA Switchboard is, how it can benefit your organisation, and how matching publication costs with publication funds works. In just 3 minutes!
5. Recording of the 9 September webinar here. A wide range of use cases covering all kind of business models and a wide range of technical implementations connected to data flows from different source systems.

Reporting Made Easy

1. Infographic here: Needs versus Reality (Research Libraries need successful Open Access strategies)
2. Infographic here: OA Switchboard as article-level reporting hub for Publishers, Libraries/Institutions and Funders
3. Infographic here: How publishers can connect to the OA Switchboard to compose and send messages
4. Video animation here: Learn what the OA Switchboard is, how it can benefit your organisation, and how “reporting made easy” works in just 3 minutes!
5. Recording of the 31 March webinar here. A practical evidence-based look at how the OA Switchboard is making reporting easier via a
Check out the ‘Participants’ page on our website for statistics and use cases.
How publishers can connect to the OA Switchboard to compose and send messages

Option 1: Manually entering data via the user interface

Option 2: Integration with the application programming interface (API) in the standard message structure

Option 3: Generic reverse connector(s) with third party systems and/or spreadsheets, to integrate with the API

Manual

Custom connector
OAS connectivity – P1-messages

(standard) Plan of Approach
What is in scope?
What data is needed?

Publication (VoR) details

<JATS>

Typically comes from your (custom) content distribution system or standard software like:

- Silverchair
- Ingenta
- Atypon

Deal information

Provide Excel (template available) with:
- Institutions & funders you have a deal with.
- Persistent Identifiers (PID).
- Deal information.

Journal master

Provide Excel (template available) with:
- List of journals.
- Basic metadata.

Will be discussed in 1st meeting!
Project approach – phase 1

*Phase 1, P1-messages:*

**Step 1:** provide samples or immediately get JATS XML feed in place (typically from your content distribution system).

**Step 2:** discuss JATS XML & journal master data & deal sheet & business rules during deep dive session (*1st meeting*). Afterwards: provide further input.

**Step 3:** development & testing on Sandbox. Demo and decide on go-live (*2nd meeting*).

**Step 4:** Move-to-Production (MTP).

8 – 16h development cost / 3 – 4 weeks lead time
publishers' integrations with OA Switchboard, generic/reverse and custom connectors and trend towards private datastore
Introducing myself

- Ivo Verbeek, solution provider in publishing. Director Appetence BV, Amsterdam, The Netherlands.
- Experience: 20+ years in software development, 15+ years for clients in academic publishing.
- Appetence helps publishers to integrate with OA Switchboard.
- We have a dedicated development team at https://elitex.systems/ (based in Ukraine, in NL represented by Appetence).
- ELITEX is the tech partner for OA Switchboard.
Appetence helps publishers here, to integrate with OA Switchboard.

Publisher

custom connector with private datastore

Relaying the response message

OA Switchboard (Message hub)

Relaying the message

Sending a response message
Generic Connectors

Editorial systems
- Editorial Manager
- ScholarOne
- OJS

Financial transactions
- Copyright Clearance Center
- eJournalPress
- BPS
- Microsoft Excel

Content distribution
- <JATS>
- Atypik
- Silverchair
- Ingenious

+ Customization = Custom Connectors
Simple workflow(s)

Publisher system contains “Vrije Universiteit Amsterdam”

Smart Matching
1) Via Ringgold mapping
2) Via ROR Affiliation matching
3) Via ORCID Affiliation

All available open source
2) ROR Affiliation matching

https://api.ror.org/organizations?page=1&affiliation=vrije universiteit amsterdam

```json
{
    "number_of_results": 16,
    "items": [
        {
            "substring": "vrije universiteit amsterdam",
            "score": 1,
            "matching_type": "PHRASE",
            "chosen": true,
            "organization": {
                "id": "https://ror.org/008xxew50",
                "name": "VU Amsterdam",
                "email_address": null,
                "ip_addresses": [],
                "established": 1880,
                "types": ["Education"],
                "relationships": []
            }
        }
    ]
}
```
“Smart matching” - results

After 100K requests, >50% matches found with score threshold at 0.9.

- Matches are good (estimated) >99%
- Exceptions are dealt with through “stop list” (dependent on feedback)


Ultimate scenario: full support Persistent ID’s throughout the publisher workflow – *Smart Matching is an intermediate solution only!*
3) ORCID affiliation

https://orcid.org/0000-0002-2626-5117

<table>
<thead>
<tr>
<th>University of Birmingham: Birmingham, West Midlands, GB</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-05-01 to present</td>
</tr>
<tr>
<td>Employment</td>
</tr>
</tbody>
</table>

**Organization identifiers**

RINGGOLD: 1724  
University of Birmingham: Birmingham, Birmingham, GB

**Other organization identifiers provided by RINGGOLD**

ISNI: [0000000419367486](http://orcid.org/0000000419367486)  
OFR: [http://dx.doi.org/10.13039/501100000855](http://dx.doi.org/10.13039/501100000855)
Thank you

Project manager:  
Ivo Verbeek  
ivo@appetence.nl

Tech lead:  
Yuri Vorontsov  
yuri@appetence.nl
Trust – The independently managed, shared infrastructure provides a safe space for publication metadata, including author details (and their affiliations), research funding information, and publication licenses.

Collaboration – The standardised protocol allows for the transparent exchange of data about OA publications, designed to operate and integrate with all stakeholder systems.

Efficiency – It eases the administrative burden of maintaining many-to-many relationships, and managing OA compliance. It also reduces the sheer volume of manual information exchange.
Thank you

Yvonne Campfens
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twitter.com/OASwitchboard
www.oaswitchboard.org

Looking forward to meet you at a conference!
UKSG (Telford, 29-30 May), Bibliotheks Kongress (Leipzig, 1-2 June)
OA Switchboard - central information exchange hub - https://www.oaswitchboard.org/

The independent intermediary, connecting parties and systems, streamlining communication and the exchange of OA related publication-level information, and ensuring a financial settlement can be handled.

research funders – libraries/institutions/consortia - publishers

- Stakeholder 1

- OA Switchboard (Message hub)

- Stakeholder 2

**Standard messaging protocol, automated validation and routing - authoritative data from source**

**Shared infrastructure, connecting and complementing existing systems and solutions - leveraged with PIDs**
How publishers can connect to the OA Switchboard to compose and send messages

Option 1
Manually entering data via the user interface

Option 2
Integration with the application programming interface (API) in the same message structure

Option 3
Integration with the API via a custom connector, sourcing data from multiple systems across the publication workflow and author journey
Option 1: UI
Option 2: API

Sending a message:

POST https://api.oaswitchboard.org/authorize

+ 

POST https://api.oaswitchboard.org/message

Relaying the response message

E.g. POST https://systemparticipant.url/oas