OAS connectivity – P1-messages

*(standard) Plan of Approach*
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 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
APPETENCE

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

OA Switchboard (Message hub)

Relaying the message

Relaying the response message

Sending a response message
Private datastore to deal with asynchronous data and to build article life cycle metadata.

Receive data → Generate 'events' & apply business rules → Compose and send message

Publisher's customer connector with private datastore

Generic reverse connector(s) to source from multiple systems and data feeds

- Editorial process details
- Publication (VoR) details
- Deal information
- Publication-level financial information
- Journal master data
- Other publisher-specific sources
Generic Connectors

Editorial systems
- Editorial Manager
- SCHOLARONE
- OJS (Open Journal Systems)

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

Content distribution
- JATS
- Atypio
- Silverchair
- Ingenta

+ 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 dealt with through “stop list” (dependent on feedback)


Ultimate scenario: full support Persistent ID’s throughout the publishing 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>
</table>
| 2018-05-01 to present | Professor of Synthetic Chemistry (School of Chemistry)
Employment |

<table>
<thead>
<tr>
<th>Organization identifiers</th>
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<tbody>
<tr>
<td>RINGGOLD: 1724</td>
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<tr>
<td>University of Birmingham: Birmingham, Birmingham, GB</td>
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<tr>
<th>Other organization identifiers provided by RINGGOLD</th>
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<tbody>
<tr>
<td>ISNI: <a href="http://dx.doi.org/10.13039/501100000855">0000000419367486</a></td>
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<tr>
<td>OFR: <a href="http://dx.doi.org/10.13039/501100000855">http://dx.doi.org/10.13039/501100000855</a></td>
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Thank you

Project manager: Ivo Verbeek
ivo@appetence.nl

Tech lead: Yuri Vorontsov
yuri@appetence.nl
OA Switchboard - central information exchange hub - [https://www.oaswitchboard.org/](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 done.

*research funders – libraries/institutions/consortia - publishers*

**OA Switchboard (Message hub)**

- **Sending a message**
- **Relaying the message**
- **Sending a response message**

- 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

**Author 1**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Initials</th>
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</thead>
<tbody>
<tr>
<td>Last Name</td>
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<td>Initials</td>
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**ORCID**

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**Author Listing Order**

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**CRedit Roles**

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<td>Select CRedit Roles</td>
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**Institutions**

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**Affiliation, as (to be) printed in the VoR**

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- **Corresponding Author**: No
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