

You can download a full copy of the intake form to preview questions as you gather information.

## Overview

### Need help?

Consult our definitions and examples for the fields in this section.  
Required fields are marked with a red asterisk (\*). Other fields are highly encouraged when applicable.

#### Contact name \*

Your first name      Your last name

#### Contact email \*

Your email address formatted as example@example.com

#### Solution name \*

A solution is a tool, product, or infrastructure component. In some cases, the solution may be the same as the provider.

#### Provider name \*

A provider is a formal or informal organization responsible for running a solution. In some cases, the provider may be the same as the solution.

#### Logo

Public link to a logo or other image representing the solution. The logo should display properly on a light background.

#### Location

Location of incorporation of the solution or provider or geographical area of primary activity.

## Website \*

Primary web presence of the solution. URL should start with https://.

## Public contact information

Contact form or email address potential adopters can use to get additional information (https://www.example.com OR example@email.com)

## Research Organization Registry ID

URL for the provider or solution's Research Organization Registry identifier.

## Need a break?

Scroll to the bottom of the page and click "Save" to save your progress and return later.

## About

## Need help?

Consult our definitions and examples for the fields in this section.  
Required fields are marked with a red asterisk (\*). Other fields are highly encouraged when applicable.

## Launch year \*

Year that the solution was first made available to users.

**Solution category** describes the function(s) the solution is primarily designed for, or how adopters primarily use the solution. Suggest up to three (3). While we'll do our best to use your suggestion(s), the final decision will rest with Invest in Open Infrastructure. Refer to our solution category definitions for more details.

## Solution category \*

Annotations system  
Archive information management system  
Authoring tool

Computing library  
Computing framework  
Data collection or management tool  
Data management planning tool or service  
Digital asset management system  
Digital library, collection or exhibit platform  
Digital preservation service  
Digital preservation system  
Digital preservation tool  
Discovery system  
Federated identity or authentication management  
Format conversion tool or service  
Geospatial data tool or platform  
Index or directory  
Informal scholarly communications  
Integrated Library System (ILS) or Library Services Platform (LSP)  
Media viewer/player  
Open access policy information compilation  
Open access or subscription management tool  
Open scholarly dataset  
Peer review system  
Persistent identifier service  
Personal information management system  
Publishing system  
Research software community  
Repository service  
Repository software  
Research profiling system  
Software preservation service  
Standard, specification or protocol  
Submissions system  
Web archiving service  
Web archiving system

## **Solution summary \***

An overview of the functions of the solution and its role in supporting research.0/1000

**Need a break?**

Scroll to the bottom of the page and click "Save" to save your progress and return later.

## Mission

### Need help?

Consult our definitions and examples for the fields in this section.  
Required fields are marked with a red asterisk (\*). Other fields are highly encouraged when applicable.

### Mission \*

Mission statement or description of problems the solution addresses.0/1000

### Key achievements

Narrative description of up to three recent milestones or achievements that demonstrate growth or progress, such as usage or adoption milestones, deployment of major features or new versions, staff additions or changes in leadership.  
0/1000

## Technical attributes

### Need help?

Consult our definitions and examples for the fields in this section.  
Required fields are marked with a red asterisk (\*). Other fields are highly encouraged when applicable.

## Open code repository \*

Does the solution maintain a public repository where the full source code is stored and shared openly, allowing anyone to access, inspect, modify, or contribute to it? Code repositories that only contain plug-ins or community contributions, or that lack critical components for running the solution do not meet the criteria for inclusion.

## Link to open code repository \*

Provide a public link to your primary code repository. Links should start with https://.

## Maintenance status \*

The solution's maintenance status. Evidence of active maintenance may include regular commits and issue resolutions in a GitHub repository, activity in community and support forums.

## Technical documentation \*

Does your solution maintain public documentation that meaningfully describes the process for users to install, configure, maintain, and troubleshoot the code for running the solution. OR, in the case of solutions not reliant on client installs, documentation that meaningfully describes how users perform tasks on the platform to utilize the solution?

## Link to technical documentation \*

Provide a public link to your technical documentation. Links should start with https://.

## Open product roadmap \*

Does your solution maintain publicly available documentation outlining the priorities and progress for product development?

## Link to product roadmap \*

Provide a public link to your product roadmap. Links should start with https://.

## Open APIs \*

Does your solution maintain public application programming interfaces (APIs) that provide developers with programmatic access to content and/or metadata?

## Link to API(s) \*

Provide a public link to your primary API. Separate multiple links with a comma. Links should start with https://.

## Open data statement \*

Public statement describing the solution's commitment to the use and availability of their data, allowing the data to be accessed to the extent possible.

## Link to open data statement \*

Public link to open data statement. Links should start with https://.

## Primary programming languages used in the tool or solution's source code

c	c++	go	haskell
html	java	javascript	kotlin
mysql	perl	php	python
r	ruby	rust	swift
typescript	clojure	other	

If "other," please list the primary programming languages used in the tool or solution's source code \*

## If you publish content, what licenses do you use, require, or support?

Traditional copyright  
Creative commons licenses  
Rightsstatement.org licenses  
Other

If "other," please list the content licenses you use, require, or support \*

## Open code license \*

Indication of whether the solution applies a standard open software license to its primary source code.

## Link to code license \*

Link to the code license attached to the tool's primary source code repository. Links should start with https://.

## What types of code license are attached to the tool's primary source code repository? \*

Apache License, Version 2.0	MIT License
BSD licenses	Unlicense

GNU General Public License (GPL)

None

Other

If "other," please list to the code license(s) attached to the tool's primary source code repository \*

This section asks you to indicate which standards and protocols {001service\_name} supports in a range of categories. Select all that apply.

What other metadata, markup, and information exchange standards do you support? \*

938\_community\_engagement\_activities\_other

What other authentication protocols do you support? \*

What other persistent identifiers do you support? \*

Metadata, markup, and information exchange standards

- Activity Streams 2.0
- Atom
- Data Documentation Initiative Codebook
- DataCite metadata schema
- Directrices Driver 2.0
- Dublin Core
- Hypertext Application Language (HAL)
- IIIF

JATS-XML	JSON
JSON-LD	KBART
Linked Data Design Principles	MARC
MARC XML	Memento framework
METS	MODS
National Information Standards Organization (NISO) Recommended Practice RP-22-2015, Access License and Indicators	OAI-PMH
ONIX	Open Archives Initiative Object Reuse and Exchange (OAI-ORE)
OpenAIRE guidelines	Ostatus
RDF	ResourceSync
REST	Rioxx
RIS	Scholix
Signposting	SPARQL
SRU/SRW	SWORD
Web Ontology Language (OWL)	XML Exchange Table Model Document Type Definition
XML-TEI	Other

## Security standards

CIS Critical Security Controls  
 Cloud Security Alliance STAR certification  
 CMMC Level 2 standards for the protection of controlled unclassified information  
 ISO/IEC 27001 information security standard  
 NIST Cybersecurity Framework (CSF)  
 NIST SP 800-171 for the protection of controlled unclassified information  
 SSAE 18/SOC 2 certification  
 Other

## What other security standards do you support? \*

## Persistent identifiers

OpenURL  
 ORCID  
 Research Organization Registry  
 Other



## Metrics reporting

COUNTER 5

Make Data Count

SUSHI

Other

**What other preservation standards do you support? \***

**What other metrics reporting standards do you support? \***

**Hosting and software as a service (SaaS) options \***

Indication of whether the software can be hosted, deployed, configured, maintained, or otherwise serviced by a vendor, whether the solution provider or a third party.

## Authentication protocols

OAuth

OIDC

SAML

WebID-TLS

WebID-OIDC

Other

## Preservation standards

OAIS

OCFL

Other

**List the other solutions your solution can integrate or is compatible with \***

## Link to vendor registry or SaaS description \*

Link to a public registry of approved third party vendors or to a description of SaaS options available. Links should start with https://.

### Integrations and compatibility

2i2c

Academic Preservation Trust (APTrust)

AfricArXiv

Arches Heritage Data Management Platform

Archipelago Commons

Archival Resource Key

Archivematica

ArchivesSpace

ARGOS

arXiv

AtoM

Avalon Media System

Biodiversity Heritage Library

bioRxiv

BitCurator Environment

Blacklight

BrCRIS

Browsertrix

CLOCKSS

COAR International Repository Directory (IRD)

COAR Notify

CollectiveAccess

CORE

COUNTER Code of Practice

Creative Commons Licenses

Crossref Metadata Retrieval

D4Science Infrastructure

DART (Digital Archivist's Resource Tool)

Data Citation Corpus

Data Stewardship Wizard

Database Information System

DataCite

DataLumos

Dataverse

Directory of Open Access Books

DLCM Backend

DLCM Portal

DMP Tool

DOAJ (Directory of Open Access Journals)

dokieli  
Dryad  
DSpace  
DuraCloud  
eduID.africa  
Electronic Journals Library (EZB)  
Episciences  
EPrints  
Érudit  
Europe PMC  
FAIR Signposting  
FAIR Wizard  
FAIRiCat  
Fedora  
fido  
FOLIO  
Fulcrum  
Galaxy  
GeoServer  
Hyku  
Hyrax  
ICPSR  
IIIF  
ImpactU  
International Generic Sample Number (IGSN)  
InvenioRDM  
iRODS  
Islandora  
Janeway  
JHOVE  
Journal Article Tag Suite  
Keepers Registry  
Knowledge Commons  
LA Referencia  
Manifold  
medRxiv  
Mendeley Data  
Metadata Encoding and Transmission Standard (METS)  
Mirador  
Mukurtu CMS  
MyCoRe  
NumPy  
O Portal Brasileiro de Publicações e Dados Científicos em Acesso Aberto (The Brazilian Open Access Publications and Scientific Data Portal) (Oasisbr)  
OA Switchboard

OA.Report  
OAPEN Library  
Omeka  
Open Archives Initiative Object Reuse and Exchange (OAI-ORE)  
Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH)  
Open Archives Initiative ResourceSync Framework Specification  
Open Book Collective  
Open Data Editor  
Open Journal Systems (OJS)  
Open Monograph Press (OMP)  
Open Policy Finder (formerly Sherpa Services)  
Open Preprint Systems (OPS)  
OpenAIRE Graph  
OpenAlex  
OpenAPC  
OpenCitations  
openCost  
OpenEdition  
Openverse  
OSF (Open Science Framework)  
Oxford Common File Layout  
Peer Community In  
PKP Preservation Network  
PREMIS Data Dictionary for Preservation Metadata  
PREreview  
Pressbooks  
Public Access Submission System  
Public Utility Data Liberation (PUDL)  
PubPub  
Pundit  
pyOpenSci  
re3data.org  
REDI  
Regensburger Verbundklassifikation (RVK)  
Renku  
RePEc  
Research Organization Registry (ROR)  
Research Resource Identification Initiative  
Rogue Scholar  
rOpenSci  
RSpace  
Society  
Synapse  
TagTeam  
Thoth Open Metadata

Tropy  
veraPDF  
ViPER  
Vireo ETD  
VIVO  
VuFind®  
Zenodo  
Zotero

## Technology readiness level

The solution's readiness for broad adoption, adapted from the framework developed by the Horizon 2020 project.

### Need a break?

Scroll to the bottom of the page and click "Save" to save your progress and return later.

## Community engagement

### Need help?

Consult our definitions and examples for the fields in this section.  
Required fields are marked with a red asterisk (\*). Other fields are highly encouraged when applicable.

### Code of conduct \*

Does your solution actively maintain and enforce a code of conduct? A code of conduct is a public document describing the expectations, norms, rules, and responsibilities for individuals participating in physical and digital communities. It should also provide explicit pathways for reporting violations and indicate how reports will be addressed and resolved.

### List other user contribution opportunities \*

**Link to code of conduct \***

Link to the public code of conduct and reporting guidelines. Links should start with https://.

**Commitment to community engagement \***

Public stated interest in and evidence of available resources for engaging with the solution's stakeholder community in a meaningful way. This may include staff explicitly tasked with community engagement, evidence of regular community involvement in major decisions, and community-driven governance.

**List other community engagement activities \***

**Community engagement activities**

- Staff roles with responsibility for community engagement
- Social media
- Webinars and training
- Annual meetings
- Volunteer or ambassador network
- Development sprints
- Other

- Mailing lists and discussion forums (including Slack)
- Blogs
- Community calls
- Interest, working, user, or advisory groups
- User research
- Conference participation

**Link to community engagement activities \***

Link to public information about community engagement activities. Links should start with https://.

**User contribution opportunities \***

Inventory of ways in which users can meaningfully contribute to the development or delivery of the solution. SELECT ALL THAT APPLY.

**Link to user contribution guidelines**

Link to publicly available documentation of the ways in which users can meaningfully contribute to the development or delivery of the solution. Links should start with https://.

**Values frameworks**

## SCOSS participation \*

Is your solution part of The Global Sustainability Coalition for Open Science Services (SCOSS) network (<https://scoss.org/>)?

## Link to membership program

Public link to a list of current members and/or information about membership. Links should start with <https://>.

## Number of members

Number of organizations and/or individuals actively participating in the membership or sponsorship program?

## Need a break?

Scroll to the bottom of the page and click "Save" to save your progress and return later.

## Policies and governance

### Need help?

Consult our definitions and examples for the fields in this section.  
Required fields are marked with a red asterisk (\*). Other fields are highly encouraged when applicable.

## Bylaws \*

Does your solution have and publicly post bylaws or other governance rules?

## Link to bylaws \*

Link(s) to public documentation of bylaws or other governance rules that describe how organizational decisions are made and by whom, member rights and responsibilities, and/or other processes and policies relevant to community regulation." Links should start with <https://>. Multiple links should be separated by a comma.

## Commitment to equity and inclusion \*

## **Link to diversity, equity, inclusion, and antiracism statement or policy \***

Public link to statement and/or evidence of activities supporting diversity, equity, and inclusion. Links should start with https://.

## **Privacy policy \***

Does your solution maintain a public policy or policies regarding the collection and use of user data or personal information? Privacy policies should indicate whether personal information is ever sold, how users can opt out of data collection, and how the solution complies with applicable laws (e.g., GDPR).

## **Link to privacy policy \***

Public link to privacy policy. Links should start with https://.

## **Web accessibility \***

Public statement describing the organization's commitment and actions to making their sites accessible to all users regardless of their abilities.

## **Link to web accessibility policy \***

Public link to web accessibility policy. Links should start with https://.

## **Web accessibility statement applicability \***

Indication of whether the web accessibility statement applies solely to a solution or provider's website or to the tool itself.

## **Governance records \***

Does your solution maintain public governance records, including board meeting minutes, records of major decisions, elections, or other indications of an active governance process?



## **Link to governance records \***

Public link to governance records, including board meeting minutes, records of major decisions, elections, or other indications of an active governance process. Links should start with https://.

## **Governance structure \***

Availability of a public description of how the solution is organized and managed, such as the roles, responsibilities, decision-making, and communication mechanisms of the stakeholders.

## **Link to governance structure \***

Public description of how the solution is organized and managed, such as the roles, responsibilities, decision-making, and communication mechanisms of the stakeholders. Links should start with https://.

## **How would you describe your business form? \***

## **Transparent pricing \***

For solutions that charge a fee, do you make available public pricing documentation in a way that allows users to meaningfully evaluate the costs associated with using the solution?

## **Pricing information \***

A public link to pricing or fees. Links should start with https://.

## **Organizational history \***

Brief narrative overview of the history of the solution and/or provider or a link to a public document.0 /1000

## **Business form \***

## **Non-profit status**

## **Staff - full time equivalent**

The current number of full-time equivalent (FTE) compensated employees.

## **Describe your board structure \***

## **Volunteers**

The current number of full-time equivalent (FTE) uncompensated volunteers whose work serves an essential business function.

## **How would you describe the purview of your board? \***

## **Community governance type \***

Public documentation of a community-driven governance structure, including evidence of community representation in governing bodies.

## **Board structure**

Structure of the solution or provider's governing board.

## **List of board members**

Link to a list of the organization's current board members. Links should start with https://.

## **Board oversight level**

Indication of whether the governing body is affiliated with the provider or the solution.

## **Affiliations \***

List of any external partners or organizations directly involved in running or governing the solution.0/1000

## Founders

Organizations and/or individuals that had a direct role in founding or launching the solution.0/1000

## Need a break?

Scroll to the bottom of the page and click "Save" to save your progress and return later.

## What is your primary source of funding? \*

## Financial information

## Need help?

Consult our definitions and examples for the fields in this section.  
Raw financial data provided in this section will be used for research purposes and will not be shared publicly unless the respondent gives explicit permission to do so.

## Shareholders \*

Does any person, company, or institution own at least one share of your solution or provider's stock?

## Primary funding source \*

Indication of whether the solution is primarily funded through program service revenue or contributions.

## Funding needs

Description of ways in which investment can help the solution achieve its goals.0/1000

## Currency

In what currency are you reporting financial information? See list of ISO 4217 currency codes at <https://www.iban.com/currency-codes>.

## Financial reporting period

Month and year of time period for which financial information is being reported (for example 07-2023 to 06-2024).

## Annual expenses in local currency

The amount of money that the organization spent on its programs, administration, fundraising, and other activities during the year. For US-based organizations, Part IX, line 25 from an IRS Form 990.

## Annual revenue in local currency

The amount of money that the organization received from all sources during the most recent complete fiscal year, such as contributions, grants, program service fees, investment income, etc. For US-based non-profits, Part VIII, line 12 from an IRS Form 990.

## Investment income in local currency

The amount of money that the organization received from interest, dividends, rents, royalties, and gains or losses from the sale of investments during the year. For US-based non-profits, Part VIII, lines 3, 4, and 7d from an IRS Form 990.

## Other revenue in local currency

The amount of money that the organization received from other sources not included in the above categories during the year. For US-based non-profits, Part VIII, lines 5, 6d, 8c, 9c, 10c, and 11e from an IRS Form 990.

## Program revenue in local currency

The amount of money that the organization received from charging fees or selling goods or services related to its mission or programs during the year. For US-based non-profits, Part VIII, line 2g from an IRS Form 990.

## Total contributions in local currency

The amount of money that the organization received from donors and grantmakers during the year. For US-based non-profits, Part VIII, line 1h from an IRS Form 990.

## To what entity does your financial information apply? \*

## Total liabilities in local currency

The amount of money that the organization owes to others at the end of the year, such as loans, mortgages, accounts payable, deferred revenue, etc. For US-based non-profits, Part X, line 26 from an IRS Form 990.

## Total assets in local currency

The value of everything that the organization owns at the end of the year, such as cash, investments, property, equipment, etc. For US-based non-profits, Part X, line 16 from an IRS Form 990.

## Permission to share financial numbers

Do you consent to IOI sharing raw financial numbers publicly?

## Top granting institutions

List or organizations that have provided the greatest amount of grant funds to the solution or provider in the past year.

0/1000

## Not ready to submit?

Click "Save" to save your progress and return later.

## Consent

By submitting this intake form you acknowledge that you have read, and on behalf of the applicable provider, agree that IOI may use the information you've submitted below in accordance with IOI's Terms & Conditions and Privacy Policy.

### Financial reporting level

Indication of whether financial information applies to the solution itself or to its fiscal sponsor or host organization.

### Financial documentation

Link to publicly or privately available documentation that validates the financial numbers reported. Examples include annual reports or IRS Form 990 for US-based non-profits. Links should start with https://.

## Infra Finder new provider intake form

**We'd love for you to be in Infra Finder**

<https://infrafinder.investinopen.org/>