



National Open Access Monitor Advisory Group Meeting, 18th September 2023

Present:

- Advisory Group: Fran Callaghan (MU); Caleb Derven (UL); Suz Garrard (SFI); Eoin Kenny (HEAnet); Kevin Kiely (TCD)
- OpenAIRE: Natalia Manola; Ioanna Grypari; Leonidas Pispiringas; Argiro Kokogiannaki
- IReL: Catherine Ferris (Chair, Project Manager), Aaron Binchy (Minutes)

Observing: Edie Davis (SFI)

Apologies: Susan Reilly (IReL); Andrew Simpson (RCSI)

Agenda: Review of draft Inception Report provided by OpenAIRE on 13th September (Appendix 1). Outcome of the meeting is to provide Advisory Group feedback to OpenAIRE on any areas in the document which need more clarity and answer any questions OpenAIRE have at this stage:

1. Presentation on draft Inception Report by OpenAIRE (Appendix 2)
2. Discussion

To note: The Inception Report is intended as a summary high-level document and does not alter the terms of the contract resulting from the tender process (LI2555F - MU – RFT Open Data).

The Advisory Group agreed:

- The draft Minutes will be supplied by Tuesday 26th September at the latest; Advisory Group and OpenAIRE to review, update and approve by 3rd October; no response will be taken as approval of the minutes.
- The draft Inception Report, annotated with comments during the review process, is to be included as Appendix 1 to these Minutes.
- All comments and questions in the annotated draft Inception Report document are approved to be actioned by OpenAIRE and are intended as indicators that the document needs more detail/clarity in that section.

Actions:

OpenAIRE: to provide screenshots showing how deliverables meet tender specifications (focusing on those detailed in the comments to the draft Inception Report)

OpenAIRE: to deliver detailed documentation for RFOs and RPOs on what constitutes measures like findability, open access etc.

OpenAIRE: to deliver detailed instructions for researchers on all aspects of the ORCID functionality: claiming, how this impacts these research outputs on the Monitor, logging in with ORCID and logging in with other credentials etc.

Advisory Group: to define procedure for how dashboard managers will be assigned.

Catherine: to provide list of RPOs and RFOs to OpenAIRE

Catherine: to provide OpenAIRE with a list of stakeholder PIDS to enable OpenAIRE to query the OpenAIRE graph and identify Irish research outputs.

Catherine: to provide OpenAire with examples of peer-reviewed journal articles with DataCite DOIs



National Open Access Monitor, Ireland

Inception Report – First Draft

OpenAIRE AMKE

Ioanna Grypari, Leonidas Pispiringas, Natalia Manola

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Abbreviations

APC	Article Processing Charge
EC	European Commission
EOSC	European Open Science Cloud
FAIR	Findable, Accessible, Interoperable, Reusable
FAQs	Frequently Asked Questions
FP	Framework Programme
FoS	Fields of Science
Graph	OpenAIRE Graph
IReL	The consortium of Irish research libraries
IT	Information Technology
Monitor	National Open Access Monitor, Ireland
MU	Maynooth University
NORF	National Open Research Forum
OA	Open Access
OS	Open Science
ORCID	Open Researcher and Contributor ID
PID	Persistent Identifier
RFO	Research Funding Organisation
RPO	Research Performing Organisation
SDGs	Sustainable Development Goals
UI	User Interface

Glossary

TERM	DEFINITION
Article Processing Charges (APC)	The fee charged by publishers in order to publish a research publication in an open access journal. These charges are meant to cover the costs of publication and ensure the work is freely accessible to all.
Research Outputs/Products	The four different types of research products in the OpenAIRE Graph: Publications, Research data, Research software, Other research products.
JOURNAL BUSINESS MODELS	
Fully OA	A journal that publishes only in OA
Subscription	A journal that charges for access to its articles.
Hybrid	A subscription journal where some of its articles are open access.
Transformative	"A Transformative Journal is a subscription/hybrid journal that is actively committed to transitioning to a fully Open Access journal. In addition, a Transformative Journal must gradually increase the share of Open Access content; and offset subscription income from payments for publishing services (to avoid double payments). ¹
JOURNAL APC BUSINESS MODELS	
Diamond OA	A fully OA journal that does not charge article processing charges (APCs).
OA TYPES/COLOURS	
Green OA	<u>Green articles are published in toll-access journals, but archived in an OA archive, or "repository". These repositories may be discipline-specific (like ArXiv) or institutional repositories operated by universities or other institutions. Green articles may be published versions or preprints, and can have any license or no license.</u>
Gold OA	<u>Gold articles have all the same characteristics as Hybrid articles, but are published in all-Open Access journals, which are in turn called "Gold journals", or just "OA journals".</u>
Hybrid OA	<u>Hybrid articles are free to read at the time of publication, with an open license. These are usually published in exchange for an article processing charge, or APC.</u>

Commented [CF1]: Request that the Unpaywall definitions are used here instead, to align with the explicit requirements defined by stakeholders. There's grey areas that aren't covered in this summary (e.g. licenses for Green)

Deleted: An open access scientific publication deposited in a repository

Deleted: A scientific publication published in a fully OA journal.

Deleted: An open access scientific publication published in a hybrid journal with an open license.

¹ <https://www.coalition-s.org/transformative-journals-faq/>

Bronze OA

Bronze articles are free to read on the publisher's website, without a license that grants any other rights. There may be a delay between publication and availability to read, and often articles can be removed unilaterally by the publisher.

Deleted: An open access scientific publication published in a hybrid journal without an open license.

Executive Summary

This Inception Report provides a comprehensive overview of the National Open Access Monitor, a dynamic platform designed to monitor and advance open access initiatives in Ireland. The report outlines the fundamental components, methodologies, and strategies that underpin the Monitor's functionality and data quality. It also sheds light on the coordination, engagement, and training aspects integral to the project's success.

1. Introduction

After a comprehensive open tender process overseen by IReL in conjunction with Education Procurement Services, OpenAIRE has been appointed to spearhead the development of Ireland's National Open Access Monitor (referred to as “the Monitor”). This seminal initiative aims to systematically analyse and track Ireland's progress towards the target of 100% Open Access (OA). In embarking on this venture, Ireland positions itself alongside its European peers, furthering the collective goal of robust Open Science (OS) monitoring. This inception report details each facet of our upcoming deliverables, providing a clear roadmap for the path ahead.

The report is structured around two central pillars:

1. **The National Open Access Monitor** - This section offers an in-depth exploration of the Monitor, detailing its dashboards and associated features. It elaborates on the specific data and indicators to be incorporated, the approach for code and data deposition, and the comprehensive documentation plan. Furthermore, it emphasizes the supportive engagement and training programmes and outlines the anticipated collaboration and contributions from IReL in its delivery.
2. **The OA Status Report²** – This section introduces the forthcoming OA Status Report, a pivotal component accompanying the Monitor. This report serves as a holistic evaluation of the open access landscape in Ireland. It meticulously assesses the precision and inclusiveness of existing publication records, identifies enduring monitoring complexities, and delivers strategic recommendations for the future.

In collaboration with IReL and NORF, OpenAIRE is committed to delivering a monitoring platform that will not only measure, but also guide the progression of OA in Ireland. Our aim is to provide stakeholders with accurate data, insights, and strategies, ensuring an inclusive, structured and informed approach towards achieving a sustainable OA future.

The subsequent sections of the report delve deeper into the aforementioned pillars. The first part focuses on the Monitor, specifically addressing: its dashboards and functionalities (Section 2), the selected data and indicators (Section 3), the data and code deposition plan (Section 4) and the associated project coordination, engagement and training programmes (Section 5). Subsequently, Section 6 expands upon the OS Status Report and Section 7 presents the project's Gantt chart.

² Referred to as simply a “Report” in the procurement process, we suggest referring to it as the ‘OA Status Report’ for clarity.

2. Dashboards & Functionalities

This section outlines the platform's user interface (UI), detailing the distinct public dashboards tailored for various user personas: National, RPO (Research Performing Organisation), RFO (Research Funding Organisation), **Repository**, and Researcher. Each dashboard provides data and functionalities specifically crafted for its designated audience.

The Monitor's National dashboard, serving as the landing page, provides a comprehensive national overview. Delving deeper, the platform introduces specialised dashboards tailored to distinct stakeholder needs. The RPO and RFO dashboards cater to their respective groups, offering organisational indicators and a detailed view of research outputs. The Researcher dashboard is specifically designed for individuals, allowing users to search for specific researchers or browse their own record and Open Access uptake. Simultaneously, the Repository dashboard facilitates the tracking of records of an institutional repository and their associated usage statistics.

Across all these dashboards, users benefit from robust search and filtering functionalities and the capability to effortlessly export data and visualisations in widely accepted formats. Benchmarking metrics and visual tools are integrated to facilitate direct comparisons between organisations and countries. Supporting the Monitor's overarching commitment to openness, transparency, and replicability, detailed documentation pages are included, ensuring stakeholders have all the tools and knowledge to achieve their monitoring objectives.

The data and indicators showcased in the Dashboards are derived from the OpenAIRE Graph (referred to as 'the Graph', <https://graph.openaire.eu/>), a scientific knowledge database that integrates **data** from over 126K data sources, encompassing 3M projects and hundreds of millions of publications, research data, software and other research products. Within the Graph's aggregation pipeline, every record undergoes rigorous cleaning, deduplication, enrichment, and interlinking to ensure accuracy and relevance. The "Data and Indicators" section includes additional details on the data shown.

For clarity in navigating and understanding the functionalities within the National Open Access Monitor, Ireland, we introduce two distinct sections within each dashboard: the 'MONITOR' and the 'EXPLORE' sections.

- The '**EXPLORE**' section offers users the ability to browse, search, discover, and link specific publications and is based on OpenAIRE EXPLORE (<https://explore.openaire.eu/>).
- The '**MONITOR**' section presents users with monitoring indicators and visualisations, and is rooted in the framework of OpenAIRE MONITOR (<https://monitor.openaire.eu/>).

Together, these sections provide a comprehensive and intuitive user experience, ensuring that users of the Monitor can both oversee the broader landscape and delve into specific research outputs with ease.

Commented [CF2]: Question for Advisory Group: The RPO is the stakeholder, the repository is one system which the RPO uses to collate, share etc research outputs. As a National Open Access Monitor represents stakeholders, why would a public *repository* dashboard be required, in addition to the RPO dashboard?
Question for OpenAIRE: will this repository data be included under the RPO (for that repository)?

Commented [CF3R2]: Edit: clarification: the tender document requires [E18] "As a repository manager, I would like to be able to easily see standardised local usage statistics for material, accessed and downloaded from my repository via OA Monitoring." and as per the requirements of the tender, this must be open. Propose that the above comment is taken into consideration on how the Dashboards are presented and how information is communicated and contextualised for stakeholders.

Commented [CF4]: Request that this is updated to "open data" and include reference to how this meets the tender requirement for a Monitor built on open data only.

National Dashboard

The National Dashboard, which also functions as the landing page of the Monitor presents an overview of Ireland's research landscape and the country's OA uptake. The dashboard is structured into two primary sections:

EXPLORE Section:

- Browse Capabilities: Users can navigate through Irish research outputs with key filters and exporting capabilities.
- Search and Discover: This feature allows users to delve into specific research outputs, offering a more detailed view.
 - This includes searching for RFO, RPO, Repository and Researcher Monitor dashboards.

MONITOR Section:

The MONITOR segment showcases various indicators and visual representations centred around OA uptake, which encompasses:

- cross-country benchmarking, and
- essential within-country metrics, featuring breakdowns by RPO and RFO.

For a detailed description of each sections' functionalities, refer to the "Common Features" section. Further specifics regarding the data and indicators shown are elaborated upon in the respective section of this report.

RPO & RFO Dashboards

The RPO and RFO dashboards offer comprehensive insights into each Irish RPO's and RFO's activities and performance within the realm of Open Science, and mirror in structure and features the National Dashboard.

EXPLORE Section:

- Browse Capabilities: Both RPO and RFO dashboards allow users to sift through their respective research outputs with key filters, further facilitated with exporting capabilities.
- Search and Discover: Just like the National Dashboard, users can probe into specific research outputs for a more granular view.

MONITOR Section:

- Indicators and Visualisations: The dashboards showcase crucial Open Science indicators, complemented by benchmarking tools and filters. These features facilitate in-depth

Commented [CF5]: Propose moving the Monitor Section up here, before the Explore Section, as the Monitor is the focus of this project (this structure is used throughout the document - propose updating throughout).

Commented [su6R5]: Agreed.

Commented [eo7]: Will all the dashboards be available to the public? Some RFO/RPOs might want to restrict access to "their" dashboards. For example the SFI Openaire Monitor is currently has restricted access. [OpenAIRE-Monitor | Browse Dashboards](#)

Commented [CF8R7]: It's a requirement of the funder that this is all open.

comparisons and present visual insights into an organisation's relative performance among its peers.

Logged-In Section for RPO/RFO Dashboards:

For the RPO and RFO dashboards, a designated logged-in section is available to individuals from these organisations. Once assigned as managers, these individuals gain access to advanced functionalities tailored for proficient dashboard management. Their array of responsibilities and powers include:

- **RPO/RFO Dashboard Management:** Managers have the capability to customise the public dashboard layout, can adjust sections, pages, and tabs and can modify text and descriptions to ensure clarity and relevance. *They are not able to "hide" (change to "Private") any indicators.*
- **Sandbox Access:** A pivotal tool, the sandbox is a copy of the public dashboard but with the added layer of Beta data and indicators. This feature allows RPOs and RFOs to vet data quality, granting them a space to trial new indicators prior to their full-fledged integration into the Monitor.
- **User Information & Collaboration:** Managers also have the discretion to invite fellow managers, facilitating cooperation and ensuring the dashboard's content remains current and accurate.
- **Link:** Managers, as any individual with login credentials, can link affiliated research products, a feature critical for maintaining the dynamism and authenticity of the data. More on this functionality in the "Common Features" section.

By providing these capabilities, we aim to bolster engagement and uplift the data quality across the dashboard, catering to varied user needs.

Repository Dashboard

To empower institutional repository managers, the Repository Dashboard has been designed as an essential tool to oversee, manage, and enhance their institutional repository's performance in alignment with Open Science standards.

Prerequisites: For an institutional repository to benefit from the Repository Dashboard, two critical steps are requisite:

Commented [eo9]: Who will be the administrator to grant enhanced access for dashboard managers? How will this process be managed? Will there be an administrator portal for the Irish Monitor?

Commented [eo10]: Will the RPO/RFO dashboards still be public but with dashboard managers tailoring them for public consumption?

Commented [CF11R10]: Following on the comments below regarding consistent visual identity, my understanding is that dashboard managers will only be influencing metadata (e.g. removing incorrect records?) OpenAIRE can you clarify in this section what exactly dashboard managers will be able to do (if visual identity isn't editable)?

Commented [CF12]: OpenAIRE will need consent from "Managers" to document the changes they make, and share them publicly as part of the transparency requirements of the project. Please update this document to reflect this.

Commented [su13R12]: Can each organisation appoint more than one manager per RPO/RFO at the outset or ... [1]

Commented [CF14]: My preference would be that the visual identity of the Monitor is consistent throughout and that RPO/RFO dashboards are not customisable in this ... [2]

Commented [JH15R14]: Sounds like the customisation may hinder benchmarking. Perhaps pause ability to do this at least for duration of current project?

Commented [kk16R14]: Agree that a consistent visual identity is preferable

Commented [Ca17R14]: Agree

Commented [su18R14]: I agree that adjusting sections/pages/tabs could disrupt the visual identity of the Monitor; however, I would be inclined to allow the ... [3]

Commented [CF19]: Query "trial new indicators", when the indicators are set at the outset. Is "new" required here?

Commented [CF20]: This will be challenging to manage from a consent perspective. OpenAIRE will need consent from each individual to document the changes those "f ... [4]

Commented [CF21]: If I'm understanding this correctly, this means that if OpenAIRE doesn't identify an article as affiliated with an RPO/RFO from open data, a "manager ... [5]

Commented [CF22]: When "Repository" is referred to here, am I correct that this is referring to both Institutional Repositories and CRIS? As many of the RPOs use both, ... [6]

Commented [Ca23R22]: Will OpenAIRE disambiguate CRIS and IR data? Should it be distinct that the RPO level?

Commented [CF24]: Request re-framing this section with the context of the tender awarded e.g. the open data for the OpenAIRE Monitor will be derived from the OpenAIRE ... [7]

1. **Integration with OpenAIRE:** The institutional repository must be registered with and integrated into OpenAIRE. This connection is essential to harness the full suite of features and insights that the dashboard presents. Metadata records from these registered repositories should align with the OpenAIRE Guidelines (<https://guidelines.openaire.eu/>) and be accessible for aggregation via the OAI-PMH protocol. Adhering to the OpenAIRE Guidelines has the following added benefits:
 - Achieve greater **interoperability**: Present richer, more contextualized content through links and relationships with varied research outcomes, such as PIDs. Enjoy flexibility from diverse and enhanced vocabularies and deeper integration with the R&I ecosystem, aligning with Open Science mandates, standards, and established metadata schemas and namespace abbreviations.
 - Ensure they are aligning with **FAIR** principles.
 - Establish their initial pathway to **EOSC**, facilitating onboarding onto the integrated EOSC Portal Catalogue and Marketplace platform.
2. **Activation of OpenAIRE UsageCounts Service:** To leverage detailed usage metrics repository managers must personally activate the OpenAIRE UsageCounts service. By having the service activated, managers receive a granulated, de-duplicated set of metadata views and downloads. This data, in adherence to the COUNTER standards, seamlessly integrates into the Monitor, offering item-based statistics. Moreover, the service provides diverse COUNTER compliant report formats, deepening the scope of usage analysis.

Public View:

The Repository Dashboard, provides a panoramic view of the repository's research landscape, this includes:

EXPLORE Section:

- **Browsing Capabilities:** Users can seamlessly navigate through the repository's affiliated research outputs. They can use advanced filters, offering a more in-depth look, and have exporting options consistent with the features in the "Common features" section.

MONITOR Section:

- **Metrics & Indicators:** This segment showcases an extensive suite of metrics surrounding the research output and the accompanying usage reports. It spotlights the repository's impact through statistics on views and downloads.

Commented [CF25]: as comment above.

Logged-In Section for Repository Dashboard:

When logging in, Repository Dashboard managers will be redirected to their dashboard in the OpenAIRE PROVIDE Service (<https://provide.openaire.eu>), the primary gateway for repository managers into the OpenAIRE Graph. This step is crucial, as the PROVIDE dashboard is part of the initial phase of the OpenAIRE Graph production workflow, ensuring the data integrity for the Monitor.³

The OpenAIRE PROVIDE dashboard, extends an enriched array of features, allowing managers to

- **Register, validate, and enrich their records:** Through the OpenAIRE PROVIDE dashboard, Repository managers can validate (incl. FAIRness) their records against the OpenAIRE Guidelines and enrich their records with potential richer metadata that come from other data sources that OpenAIRE harvests from.
- **View details on the aggregation history of their repository.**

Researcher Dashboard

ORCID Integration:

The Researcher Dashboard's core strength lies in its tight integration with ORCID. Every researcher's profile is anchored to their ORCID iD, which can be used for logging in as well, ensuring that personal and professional details displayed are authentic and consistent.

- **Enhancements in Monitor:** The Monitor will offer the capability to enrich the ORCID record of a researcher (via the *Claim* functionality).
- **Personal Data Updates:** For any changes to personal data, researchers can update their ORCID profile directly. These changes will reflect on the Monitor dashboard after the next OpenAIRE Graph update, which takes monthly.

Public View:

The dashboard will display (i) a series of Open Science performance metrics for the researcher, followed by (ii) a comprehensive list of their research works. Users will have the flexibility to browse, filter, export, and download their outputs.

Logged-In Section:

Researchers, when logged into the Monitor, can:

Commented [eo26]: How do we get repository owners to register and provide details of their repository/journal/cris? Could we use funding to assist managers with this work or is it trivial and done once?

Commented [CF27R26]: I will be sending out invitations to stakeholders to integrate their systems with OpenAIRE, if they would like to proactively enhance the open metadata representing their organisation, in this way. As I understand it, OpenAIRE will provide training and support for doing this (is that correct Leonidas?). The NORF Repositories project is also working with repositories on OpenAIRE standards.

Commented [Ca28R26]: Should we explicitly flag integration as a joint issue with the NORF repositories? I think there is some membership crossover with this project.

Commented [CF29R26]: I've already flagged this.

Commented [eo30]: Does this functionality exist today? I don't see the ability to do this today on the openaire website.

Commented [CF31R30]: I've gone through this process in the "EXPLORE" section of OpenAIRE (you can see the source examples "via OpenAIRE Explore" on my record here <https://orcid.org/0000-0002-8723-1359>). OpenAIRE: can you confirm that this will be available through the "MONITOR"/National Open Access Monitor?

Commented [kk32]: Does this only include ORCID Works?

Commented [CF33]: OpenAIRE will need to obtain consent from the researchers to log all the changes made, and share them publicly to meet the transparency requirements of the project. Please consider how OpenAIRE will manage this and update this document accordingly.

Commented [Ca34]: Will individual researchers need to do this on a case-by-case basis?

³ <https://graph.openaire.eu/docs/graph-production-workflow/>

- **Connect** their ORCID account directly, offering a seamless integration experience.
- Grant OpenAIRE the permission to **enhance** their existing ORCID profiles.
- **Discover** research outputs and **claim** them as their own. These will then be added to both their Monitor dashboard and their ORCID record if permission has been granted by the researcher.
- *As any individual with login credentials*, researchers can link affiliated research products.⁴

Common Features

Browsing, Advanced Search, and Filtering

The **EXPLORE** sections of the portal will present enriched metadata records, detailing both access rights and the open access types/colours (Green, Gold, Hybrid, Bronze, Diamond OA) for each research output.

Commented [su35]: Will this include a history of embargo status? (Apologies if this is addressed elsewhere).

The **advanced search** feature provides a refined approach to navigation with the following *search filters*:

- RFO, grant award ID, project acronym
- RPO, RPO of the corresponding author⁵
- year of publication (range)
- Fields of Science (FoS)
- publisher, journal
- author name, ORCID iD

Users can combine these filters in any arrangement to pinpoint specific results. **Note:** We can customize the availability of additional metadata fields if requested.⁶

Commented [CF36]: I'm unsure what this means - OpenAIRE can add additional metadata fields, or remove metadata fields?

Additionally, when **browsing** research products the following *filters* are available:

- **peer-reviewed** (pre-selected as default)
- type of research output: **Publications** (pre-selected as default), datasets, software, other research products.
- RFO
- year of publication (range)
- FoS
- country of affiliated RPO
- language

⁴ More on this functionality in the "Common Features" section that follows.

⁵ Examination of the availability of data on the corresponding author will be detailed in the OA Status Report.

⁶ The current specification of advanced search filters in OpenAIRE Explore can be viewed in this link: <https://explore.openaire.eu/search/advanced/research-outcomes>.

- data source
- Research Community

In the context of the **Irish Monitor**, which prioritizes peer-reviewed publications, including all research outputs and setting the default filters to "peer-reviewed" and "publications" ensures a streamlined focus. This approach also offers adaptability for future expansions to cover other research products and non-peer-reviewed publications by simply deselecting these filters. If desired, the filters can be removed and only peer-reviewed publications can be included in the Monitor.⁷

In the **MONITOR** sections of the dashboards, the primary *filters* available are

- peer-reviewed (pre-selected with the same argument as above)
- year of publication (range)
- FOS

To maintain clarity in our visual insights, we avoid an overabundance of filters that might obscure the visualizations. Instead our approach centres on presenting distinct visualizations with emphasis on specific breakdowns, such as by RPO, RFO, Grant ID, and other relevant categories.

Custom Publication Set Comparison

The Monitor introduces a feature allowing **users** to upload a list of DOIs for comparison. Once uploaded, users can verify if a particular DOI is present in the Monitor and view its Open Access types/colours as assigned within the system. For optimal performance, each list will have a **maximum limit of 50 DOIs**.

Exporting & Integration

The Monitor provides users with several options for data exporting and integration, catering to a variety of research and analytical needs.

- **Data Exporting & Downloads:** Users have the flexibility to:
 - Export *datasets* and *indicators* in CSV formats.
 - While it is technically feasible to increase the current limit of 2,000 records per export, it's essential to weigh the practicality of such changes. For instance, even if a user downloads a CSV containing 200,000 publications, the sheer size might render the file challenging to open and manage on standard

⁷ In OpenAIRE's criteria for classifying a publication as peer-reviewed, having a DOI from Crossref is mandatory; thus, the presence of a PID for such classification is a fundamental requirement.

Commented [CF37]: The format of this document is leading to confusion: everything OpenAIRE will deliver is the "National Open Access Monitor", and yet in the paragraph above, there's reference to datasets, software etc.

The tender requirements [M6] asked that "The Monitor **MUST**, at a minimum:" [...] Initially focus on monitoring peer-reviewed articles and conference proceedings", but if there's the potential to include in the Monitor datasets, monographs, book chapters, other scholarly publication outputs etc at this stage, that would be very welcome.

Please clarify if that's the case.

If this is the case, then having the Monitor set to default to peer-reviewed only (e.g. for datasets) doesn't make sense. I don't currently see the logic for removing functionality, so please provide more clarity here to enable us to make a decision.

Commented [CF38]: All of the tender specifications were for the "National Open Access Monitor", and it is unclear in this document what the effect of OpenAIRE presenting both the OpenAIRE MONITOR and OpenAIRE EXPLORE, combined, as the National Open Access Monitor has, and how stakeholders will understand it.

It's unclear whether the OpenAIRE MONITOR will deliver as per our expectations for the National Open Access Monitor, and whether we will require those additional filters without further clarity.

I would find it helpful if OpenAIRE provided a collection of screenshots from current OpenAIRE examples that corresponds with the tender specifications M11-16, M20, B1-2, C1-5, C9-11, D1-6, E1-3, E8-10, E12, E14-21 to make it clearer exactly how each aspect is meeting the specified requirements.

Commented [CF39]: All users?

Commented [CF40]: Is there a possibility to expand this? This would be very challenging for RFOs or RPOs to utilise at this limit.

software. In cases requiring extensive data, the data dump is a more efficient solution.

- Access “Download From” links on the EXPLORE sections of the dashboards which provide the Open Access links for a publication, allowing users to directly download the PDF.
- Access regular data dumps of Monitor from Zenodo.
- Access the OpenAIRE API - <https://graph.openaire.eu/develop/api.html#products>
- *Repository Manager Only*: Download enriched metadata records of their institutional repository, via the OpenAIRE Broker service, through OpenAIRE PROVIDE. <https://graph.openaire.eu/develop/broker.html>

- **Visualisation Download & Integration:**

- Users can download indicator visualizations in PNG, SVG, JPEG, and PDF formats.
- Users can embed an indicator or a set of indicators to their website by copying the given inline frame and adding it to their HTML page accordingly.

- **RESTful Data Access:** Upon request, the Monitor service possesses the capability to seamlessly integrate Monitor Data with RFO or RPO platforms via APIs, standard protocols, and metadata schemas.^{8,9}

Login Options & Functionalities

While the Monitor is publicly open, enhanced functionalities are available for users who choose to log in through the OpenAIRE AAI Service. This service supports several login methods, such as institutional email (via EDUGAIN), GitHub, Google, LinkedIn, ORCID, or an exclusive OpenAIRE account.

After logging in, users gain access to the management functions mentioned in the preceding sections and to the “link” feature. This feature enables users to associate research outputs with distinct projects, communities, or other research outputs, thus enriching the information in both the OpenAIRE Graph and the Monitor.¹⁰

⁸ A documented case-study is the integration of OpenAIRE with SyGMA, the EC participant portal. The latter is using the OpenAIRE APIs to collect information about publications and datasets resulting from funded projects to facilitate the reporting process and acquire a reliable and authoritative source to verify this information. More information: <https://www.openaire.eu/reporting-research-outputs-to-the-ec-using-the-openaire-api>, <https://www.openaire.eu/reporting-to-the-ec>.

⁹ Harvesting metadata from Monitor via OAI-PMH: OpenAIRE has already implemented an OAI-Publisher service and would be able to offer the functionality of harvesting metadata from the Monitor via the OAI-PMH protocol. However, as OAI-PMH is not the state-of-the-art protocol to serve big data, the volume of OpenAIRE graph has surpassed the limits and therefore, has stopped its operations. Instead, OpenAIRE offers other solutions described in the text. If requested and upon agreement with the Contracting Authority, OpenAIRE can reinstate OAI-Publisher for the Monitor.

¹⁰ <https://www.openaire.eu/claim-publication>

Commented [CF41]: Agreed, if monthly data dumps are provided?

Commented [CF42]: Please update this document to specify when data dumps will be delivered. Can we confirm if it's monthly?

Commented [CF43]: Please provide more information here. How does this differ from the OpenAIRE API referenced above? Is it a public API? Is there documentation available on use of this API (if different)?

Commented [CF44]: The stakeholder specifications included OAI-PMH, so the project should keep to these specifications.

Commented [CF45]: Please describe how OpenAIRE will obtain consent to log and share publicly the changes that these users will make to enrich the open data for the Monitor.

Integration of Matomo for Usage Analytics

The Monitor service integrates the Matomo analytics platform, an open-source solution, to track service usage and produce in-depth web statistics. Additionally, this platform is configured, where relevant, to provide COUNTER statistics to measure user engagement.

In prioritizing data privacy and specificity, **access to these analytical reports will be selectively granted.** Only administrators and certain user personas, who would benefit from such insights, will be able to access these reports. This integration aims to offer the Monitor valuable user behaviour insights, all the while adhering to privacy standards.

Helpdesk

From the Monitor, users can submit feedback, which is directed to the OpenAIRE Helpdesk, powered by Zammad¹¹ for **comprehensive issue tracking.** Within the Helpdesk, a section is specifically dedicated to the Monitor. This system mirrors the setup at <https://www.openaire.eu/helpdesk>.

Documentation on the Platform

The Monitor will feature **dedicated documentation pages**, focusing particularly on Frequently Asked Questions (FAQs), and the terminology and construction of indicators. These sections will be curated to ensure clarity and comprehension for all users.¹²

Technical Support & System Testing

A Redmine-based ticketing system will promptly notify OpenAIRE's technical team and IReL's technical support contact about any system disruptions or technical difficulties. Additionally, every four months, we schedule regular system testing, which includes VM backups for stakeholders, VM restore tests, and offsite restore tests.

Commented [CF46]: Please clarify this further. As there is no need for reporting with data privacy elements to deliver of the project, do not enable this as described. It was a requirement of the tender that "web and/or COUNTER statistics indicating user engagement with the service" are provided.

It's a requirement of the project that these deliverables are transparent. Please review and consider if such reports can be anonymised to enable sharing publicly. It is not acceptable that delivery of this tender specification would be restricted, as it will be a key indicator for whether the Monitor is meeting the national need.

Commented [CF47]: Please indicate which elements of this issue tracking will be stored, maintained and shared publicly on zenodo, as per the consent form which OpenAIRE will provide.

¹¹ <https://zammad.org>

¹² Comprehensive documentation will also supplement the Code and Data deposition outlined in the relevant section below.

3. Data and Indicators

In this section, we delve into the fundamental components underpinning the Monitor. These components encompass the core data and essential indicators that serve as the bedrock of the Monitor's functionality. Additionally, we explore the techniques employed to enhance data quality and the tools integral to this process. A comprehensive understanding of these elements is crucial for grasping the Monitor's operational mechanisms and the valuable insights it offers. The assessment of data quality and recommendations for enhancements will be provided within the forthcoming OA Status Report.

Early in the pilot phase (by month 6), achieving complete data integration and curation may encounter challenges, primarily reliant on stakeholder engagement. If full integration is not feasible, a scaled-down delivery is planned for month 6, with continuous updates as more data is incorporated and validated.

OpenAIRE Graph: Foundation of the Monitor

The Monitor is built upon the OpenAIRE Graph (<https://graph.openaire.eu>). An open resource that aggregates a collection of research data properties (metadata, links) available for funders, organizations, researchers, research communities and publishers to interlink information by using a semantic graph database approach.

The Graph aggregates around 450 million metadata records from more than 120,000 trusted scholarly communication sources worldwide, including Crossref, Unpaywall, ORCID, Microsoft Academic Graph, institutional and thematic repositories (registered in OpenDOAR, re3data.org and FAIRSharing.org), Open Access journals, data archives, and the EOSC Service Catalogue. These metadata records are harvested and enriched with links between research results and projects, author affiliations, subject classifications, and links to domain-specific databases using dedicated inference algorithms. OpenAIRE's metadata records are cleaned, deduplicated, enriched, and transformed according to the OpenAIRE internal metadata model, generating the final OpenAIRE Graph.¹³ A new version of the OpenAIRE Graph is available every month. The OpenAIRE Graph is available for download and reuse under a CC-BY license.

Identifying Irish Research Outputs

This section outlines the processes through which the Monitor compiles and utilizes data from Irish Research Performing Organizations (RPOs) and Research Funding Organizations (RFOs), ensuring comprehensive and high-quality information in the Monitor.

¹³ <https://graph.openaire.eu/docs/>

Commented [CF48]: Requesting an update to this: it's OpenAIRE's responsibility to ensure complete representation of Irish research outputs based on public open data only, as per the tender documents on which the contract was awarded. It's not a requirement of the stakeholders to integrate with OpenAIRE to enable delivery of this project. Integrating with OpenAIRE provides an opportunity for stakeholders to proactively participate to enhance the quality of the metadata, if resources and systems allow, but delivery of an accurate Monitor should not be dependent on this, and this is not messaging that is appropriate for OpenAIRE to be communicating with stakeholders.

Commented [CF49]: Microsoft Academic Graph was discontinued in December 2021. Please provide current information here. Has OpenAIRE identified and is using an alternative to MAG?

Commented [JH50R49]: isn't MAG now OpenAlex?

Commented [CF51R49]: OpenAlex launched with MAG data, and built on it: <https://blog.ourresearch.org/openalex-update-june/#:~:text=Last%20month%2C%20we%20announced%20that,MAG%20itself%20will%20be%20discontinued>. Question for OpenAIRE: please clarify if OpenAIRE will use OpenAlex, another source, or no other source, in the absence of MAG.

Identification of Irish RPO Research Output

The Monitor leverages the comprehensive affiliation information already present in the OpenAIRE Graph to identify Irish RPO research output. The provenance of affiliation links in the Graph includes

- Institutional repositories registered in OpenAIRE
- Metadata from harvested data sources such as **Microsoft Academic Graph** and Crossref.
- Inferred links via text mining.
- Links created via the claim and link functionalities in OpenAIRE EXPLORE.¹⁴

Commented [CF52]: As above. Out of date.

Identification of Irish RFO Research Output

To guarantee a thorough representation of funded research outputs, the OpenAIRE Graph establishes links between publications and their associated funding data through a variety of methods:

- *Harvesting links from repositories, OA Journals, CRIS systems.*
- *Merging information from CrossRef/FunderfundedBy field.*
- Collecting links from users via the "link" functionality.
- Exchanging data with the EC's IT systems for EC/FP funding.
- Text mining of full text publications to identify the grants for 30+ funders that have joined OpenAIRE (see next paragraph).
 - Science Foundation Ireland (SFI) is one of them.

Formatted: Font: Italic

Commented [ed53]: FundRef is now Open Funder Registry (OFR)

Formatted: Font: Italic

Optional Add-on: Funding Classifiers for Enhanced Data Quality

For funders that join OpenAIRE,¹⁵ we utilize advanced text mining techniques and create specialized funding classifiers to analyse publication abstracts. This process establishes links between funders, projects, and research outputs, resulting in a significant enhancement of data quality for RFOs within the Graph. OpenAIRE is open to developing custom classifiers for Irish funders upon request. Importantly, this collaboration is not obligatory for RFOs to access their dashboard and display research outputs in the Monitor. Instead, it represents an optional opportunity to elevate data quality.

Commented [CF54]: Requesting that the framing of this document is updated to disentangle (a) the Monitor, what it will deliver, and it's sources and (b) the ways that stakeholders can proactively engage to register open data with OpenAIRE that will be used by the Monitor. At the moment, it's all mixed up and is very confusing for the stakeholders. This section "Optional Add-on: Funding Classifiers" - is as optional as a repository registering with OpenAIRE, but that's given priority on page 10.

¹⁴ See previous section for a description.

¹⁵ <https://www.openaire.eu/funders-how-to-join-guide>

Refining the Monitor Dataset

Identification of Irish OA Peer-Reviewed Publications

The Monitor further refines the set described in the previous section, to identify Irish peer-reviewed publications, their access rights and Open Access types/colours using the following criteria.

Peer-Reviewed: OpenAIRE collects and incorporates different publication types according to the OpenAIRE Guidelines. Peer-reviewed publications and conference proceedings are filtered by an algorithm with multiple advanced filters (e.g., excluding non-applicable publication types as letters, including journal datasources, having a DOI from Crossref and a gratifying number of references).

Open Access: OpenAIRE uses the Budapest Open Access Initiative definition of "open access": "By 'open access' to this literature, we mean its free availability on the public internet, permitting any users to read, download, copy, distribute, print, search, or link to the full texts of these articles, crawl them for indexing, pass them as data to software, or use them for any other lawful purpose, without financial, legal, or technical barriers other than those inseparable from gaining access to the internet itself."¹⁶

Open Access Types/Colors: OpenAIRE and OpenAIRE MONITOR adopt the "open access types" definitions from the Unpaywall construction methodology.¹⁷

Use of Persistent Identifiers (PIDs): The Monitor uniquely defines an Irish scholarly publication as one that contains a persistent identifier (PID) of an Irish organization, whether it is in the publication metadata, PID metadata, or within the publication content. OpenAIRE seamlessly integrates various PIDs for research outputs and organizations. The deduplication process ensures that metadata records from different data sources are merged with publicly displayed provenance information. This guarantees comprehensive coverage and data consistency.¹⁸

Data Disambiguation Techniques

Deduplication in OpenAIRE: The OpenAIRE Graph collects metadata records about scholarly works from different providers, which can carry different information. To provide accurate statistics, OpenAIRE merges duplicate records of the same scholarly work. The deduplication process is

Commented [CF55]: Peer-reviewed publications may also have DataCite DOIs. Please provide more detail here on how the Monitor will not exclude those.

Commented [Ca56R55]: Figshare repositories (RCSI and UL) use DataCite DOIs for publications...

Commented [CF57]: What does this mean?

¹⁶ <https://www.budapestopenaccessinitiative.org/read/>

¹⁷ See Glossary for definitions.

¹⁸ Additional documentation on the various identifiers utilised in the OpenAIRE Graph can be found here <https://graph.openaire.eu/docs/data-model/pids-and-identifiers>.

described in detail in the following link: <https://graph.openaire.eu/docs/graph-production-workflow/deduplication/>

Organizations: Organizations in OpenAIRE are aggregated from different registries and are deduplicated using OpenOrgs, a tool that combines an automated approach with a "humans in the loop" approach. OpenOrgs aims at grouping records that would more likely be comparable, based on URL-based and title-based functions. The groups of equivalent organizations are obtained through duplicates grouping, and representative organizations inherit all properties from the merged records and keep track of their provenance. Designated users in the Monitor can be granted access to OpenOrgs to deduplicate Irish RPO records.

Journals, Publishers and Licenses: To provide meaningful statistics, Monitor presents disambiguated journals using their ISSN numbers and has an ongoing process of normalizing licenses. The team is currently working on a similar process for disambiguating publishers.

Authors: Researcher dashboards and corresponding research outputs will be based on ORCID IDs as presented in the previous sections.

Indicators

The Monitor will synthesize complex information providing actionable indicators for stakeholders, starting from simple counts (e.g., number of publications by access rights), to constructing metrics such as Green, Gold, Hybrid, Bronze (following the well-accepted Unpaywall construction methodology) and Diamond OA publications, to more complex composite indicators (if requested) such as RPO "FAIRness" Score and PlanS compliance.

The OpenAIRE Graph also contains a series of bibliometric indicators from data retrieved from BIP! Finder here: <https://graph.openaire.eu/docs/5.0.0/data-provision/indicators-ingestion/impact-scores>, and has already in the plans to integrate additional novel indicators related (collaboration indices, mentions, reproducibility). The Monitor can provide collaboration and bibliometric indicators such as the citations and the co-authorship/co-creation of research outputs, upon request.

In addition, all indicators currently in OpenAIRE MONITOR can be extended to the Monitor. They are all community-led, validated and transparently documented.¹⁹

¹⁹ <https://monitor.openaire.eu/methodology/terminology#constructed-attributes>

Commented [CF58]: Please ensure that Designated User Access is approved by the IReL Project Manager, and consent is obtained by OpenAIRE to log, store and share publicly the changes made by these users. The Advisory Group will need oversight of the changes made and will give final approval.

Commented [CF59]: There is insufficient information provided in this paragraph. Not being able to normalise licenses or disambiguate publishers will have a significant impact on successful delivery of the Monitor. Please provide more information on the timeline for completing these processes, and the expected impact on the Monitor (at month 6, and at month 11)

ReL is invited to provide a final list of indicators for the Pilot Monitor (M6) and the final production Monitor (M12).

Key Indicators

At a minimum, the Monitor will present indicators that will identify:

- Embargoed and immediate OA
 - The main access right types currently available at the OpenAIRE Graph are (i) Open Access/Open Source, (2) Embargo, (3) Restricted, (4) Closed Access. OpenAIRE maintains all instances of access rights and their original data sources in the merged record. However, is only able to access the *current status* of a publications access rights and not the original ones when it was integrated in the OpenAIRE Graph.²⁰
- Repository-mediated and publisher-mediated open access
- OA Types/Colours
- The licenses of OA publications
- The “unrealised” OA of the Irish publications - by assessing the closed access publications that are found Open in repositories as well as the share of closed access publications.
- APCs (as reported to OpenAPC)
- Journal Business Models (Fully Open Access, Hybrid, Subscription and Transformative)
- Journal APCs Business Models (Gold/Hybrid OA with APCs vs Diamond OA)²¹

The Monitor will also offer **comparison indicators and breakdowns** by

- year,
- data source,
- domains/interdisciplinarity,
- publishers, journals and organizations.

ReL is invited to confirm a final list breakdowns of interest.

Historical Snapshots

OpenAIRE will provide through the historical snapshots of the Monitor metrics to measure the evolution in the share (%) of OA publications. Thus, users will be able to view progress in Open Science uptake over time, using data from different versions of the Monitor data.

²⁰ To be validated in the OA Status Report.

²¹ See Glossary

Commented [CF60]: Footnote 19 directs to a link which contains "Entities; Inherited and Inferred Attributes; Constructed Attributes". Please let us know from which of these lists we are to provide a final list of indicators?

Can I also confirm that this selection, is in addition to those detailed in the tender specifications?

Commented [CF61]: Please provide more detail on this. Accepting that the Monitor will start with data as-is, if in three months time, a funder wants to check if a open article was open two months ago at the date of publication, how will they do that?

Commented [CF62]: Please clarify, will only journals that meet the coalition's definition of transformative be included here (as defined above?)

Commented [CF63]: Where will transformative agreements/oa publishing agreements be identified? [C9/D1]?

Commented [CF64]: Can I clarify what OpenAIRE needs here, in addition to what the tender documents specify? There are some elements which are referred to in the tender, which haven't been referred to here (e.g. below), but our expectation is that the tender specification is comprehensive.

- The Monitor MUST show to what extent Irish scholarly publications resulting from **publicly funded research** are immediately openly available by default and are accessible on an ongoing basis. Publicly funded in this context is defined as "Publicly funded research is research undertaken in whole or in part via publicly funded resourcing or remuneration, e.g., salaries, grants, contracts, etc."

- The Monitor MUST be able to identify the percentage of OA availability and the progress of this over time, with drill-down functionality in a number of facets including funding agency, Irish HEI, corresponding author affiliation, year of publication, subject or keyword, publisher, grant award ID, or arbitrary combinations of these.

These historical snapshots will be taken at a frequency agreed upon with IReL, and the first one will be taken upon the release of the Monitor. _____

Commented [CF65]: As the OpenAIRE Graph is updated monthly, please update the snapshots monthly. Please specify the date each month that the snapshot will be taken, to enable stakeholders to update metadata in advance of that, or understand this about the data when reusing

4. Code, Data Deposition & Documentation

Code & Data Deposition

In compliance with transparency and OS standards, OpenAIRE ensures the following principles throughout the Monitor's development.

Documentation and Data Preservation:

- All processes involved in delivering the Monitor will be documented and deposited in Zenodo. These documents will be publicly available under an open license.
- The data that underpins the National Open Access Monitor will be deposited in Zenodo under an open license. This deposit will occur before the contract terms conclude or renew. OpenAIRE will regularly provide data dumps, which include all data and indicators, to Zenodo.

Source Code Openness:

- OpenAIRE will release the Monitor's source code, the data dump, and the Monitor dashboard code to the public under an open-source license, determined in consultation with MU. In cases where the Monitor relies on existing software frameworks or libraries, OpenAIRE ensures that such frameworks or libraries can also be made available under an open-source license.

API Considerations:

- While OpenAIRE's APIs are utilized by its services to access data, it is important to note that the source code of these APIs **will not be integrated into the platform's source code.** This decision is due to the generic nature of the software, as it is employed not only by OpenAIRE Services but also by various external services that rely on OpenAIRE's data and resources. However, this separation does not affect the Monitor's functionality or its commitment to openness. OpenAIRE remains committed to delivering valuable insights and maintaining compatibility with other systems, supporting a collaborative research ecosystem.

Commented [CF66]: It is a requirement of the tender and the contract that: M10 "Where the Monitor relies on existing software frameworks or libraries, Vendors MUST ensure that such frameworks or libraries can also be made available under an open-source licence" (as is referred to above). This paragraph currently isn't acceptable. Please review and consider how OpenAIRE will meet the contractual obligations for this.

Documentation

The Monitor will be accompanied by comprehensive documentation covering various essential aspects, including:

- **Data Sources:** Detailed information about the data sources, including their origin (RPO Repository, RFO Data), and an overview of the Monitor Data's characteristics.

- **Methodological Approach:** A clear description of the approach employed in the Monitor's development. This approach is based on principles such as inclusion, transparency, quality, and state-of-the-art technology. It encompasses methods, tools, and processes employed for data collection, analysis, and visualization.
- **Terminology:** An explanation of the terminology used within the Monitor. This will clarify the entities, attributes derived from the data (inherited, inferred, or constructed), and definitions of relevant concepts, indicators, and metrics.

A sample of documentation detailing OpenAIRE's data and processes can be found in our reference study for the OA Monitor for H2020 in the appendices in the following link:

<https://op.europa.eu/en/publication-detail/-/publication/56cc104f-0ebb-11ec-b771-01aa75ed71a1>

Lastly, as described in the "Common Features" section, the Monitor will also include dedicated documentation pages for usability and accessibility, adopting content from the following sources.

- OpenAIRE Graph:
 - <https://graph.openaire.eu/docs/>
- OpenAIRE MONITOR:
 - <https://monitor.openaire.eu/methodology/methodological-approach>
 - <https://monitor.openaire.eu/methodology/terminology#entities>

Commented [CF67]: This link returns an error message "Publication Detail Portlet is temporarily unavailable. "

5. Project Coordination, Engagement & Training

Project Coordination

IReL and OpenAIRE project teams currently engage in regular online meetings every two to three weeks, ensuring the project progresses effectively. While meetings typically occur at fixed times, adjustments can be made to accommodate participants' schedules. Each meeting follows a predetermined agenda, distributed to participants beforehand. The agenda typically encompasses:

- revisiting the project's timeline and deliverables,
- reviewing progress made since the prior meeting,
- addressing challenges encountered by both teams and discussing resolutions,
- exchanging feedback aimed at refining the Monitor's operations,
- plotting the tasks each team should tackle next, and
- setting the date and time for the following meeting.

A specific moderator oversees each meeting, ensuring its productivity and relevance. This moderator then circulates a summary of the key points and decisions from the meeting to all participants.

In addition to these meetings, we have established a shared workspace on Microsoft Teams where team members have access to meeting minutes, shared documents, and other relevant materials. This collaborative space fosters transparent communication and ensures everyone remains updated.

Monitor Advisory Group

Moreover, OpenAIRE will meet with the Monitor Advisory Group. This group offers invaluable feedback on the Monitor's development. Such interactions are synchronised with the project's milestones and deliverables, as detailed in the project plan. Once vetted by project partners, all relevant documents, including meeting minutes, are made publicly available on Zenodo.

Stakeholder Engagement

Stakeholder involvement is foundational to the success of the Monitor. Active participation ensures that the Monitor's data is not only of high quality but also that the platform is relevant and inclusive, providing true value to its users.

Pursuit of Data Excellence

While the Monitor leverages public open data, stakeholder collaboration is paramount to elevate the quality, depth, and relevance of this data foundation.

IReL occupies a pivotal role, consistently liaising with stakeholders.

This collaborative endeavour aids stakeholders in enhancing the quality of the public data they present, whether directly via an external data source harvested by OpenAIRE, such as Crossref, or through OpenAIRE's bespoke data improvement services, including OpenOrgs. This ensures the data adheres to stringent quality criteria.

Furthermore, engagement efforts can inform Institutional Repositories about the merits of registering with OpenAIRE and highlight the prospective advantages for RFOs in **sharing project data** with OpenAIRE. This facilitates the latter in crafting specialised text mining algorithms linking projects to funded publications, ensuring a high quality and curated monitoring platform. Although these steps present an enhanced value, they remain optional.

In addition, by **furnishing OpenAIRE with a comprehensive list of stakeholders**, IReL can ascertain that the Monitor inclusively showcases all key parties with tailored dashboards, underlining the cooperative nature of the project.

Inclusivity through Active Engagement

The Monitor is conceived to align seamlessly with its users. Through targeted stakeholder engagement, we endeavour to cater to the distinct needs of a diverse user community. This approach not only amplifies the Monitor's proficiency but also refines the user experience, producing a solution shaped by and tailored to its users.

IReL spearheads stakeholder engagement activities, with OpenAIRE on hand to assist with presentations, training, and additional discussions. This collaborative effort ensures that the Monitor resonates with those it is crafted for.

To enhance this collaborative spirit, specialized training sessions are in the pipeline. These sessions aim to equip stakeholders with pivotal knowledge and skills, nurturing an integrated collaboration.

Stakeholders interested in participating will be asked to sign either one or two consent forms, depending on their specific engagement: one from IReL and/or another from OpenAIRE. These forms authorize the use, storage, and preservation of their contributions throughout the Monitor's development. Additionally, the project meticulously tracks all stakeholder engagements to ensure that feedback is captured comprehensively and that every key stakeholder is aptly represented.

Commented [CF68]: Please rephrase to highlight that this activity is **making data open**.

Commented [CF69]: Stakeholders have been invited to participate in the IReL-managed project, and have provided consent to me, to capture the contributions they provide me, to store those and make them public etc. (some have chosen to not be identifiable, and to be pseudonymised). A copy of the consent form is available here: <https://zenodo.org/record/7589771>. Supplying the vendor with a list of those stakeholder participants was not sought or granted.

If OpenAIRE would like to engage with stakeholders directly, I can put an invitation out through the Project Mailing List to ask them to get in touch (at which point, OpenAIRE can initiate the consent process etc).

If this relates to which entities should have RPO dashboards, and which entities should have RFO dashboards in the Monitor, we can provide that.

Please clarify what OpenAIRE are asking for here, and for what purpose.

Commented [ig70R69]: Thank you Catherine. We were wondering if we could have a list of RPOs and RFOs in order to compare with what we have in OpenAIRE (i.e. a data quality check). That way we will make sure that all stakeholders have a dashboard.

Commented [CF71R69]: Confirming that we will provide a list of RPO and RFOs for dashboards in the Monitor.

Training

OpenAIRE, in partnership with IReL, has prepared a tentative training programme for the Monitor, catering to the distinct needs of various user groups.

Commented [CF72]: propose "is developing a training programme". Why tentative?

Commented [ig73R72]: Because we have not finalized what is needed by the stakeholders, perhaps there are weak spots that require more training.

Commented [CF74R72]: OK.

Planned Training Sessions

- Mini-Training Sessions for RFOs and RPOs: These specialised sessions offer insights and guidance tailored for Research Funding and Performing Organisations.

On-Demand Training Areas

Based on feedback from engagement activities, led by IReL, additional training sessions can be offered as required, on the following topics

- *Platform Administration*: Introducing users to the Monitor's functionalities and navigation.
- *Data Quality & Metadata Standards*
- *Indicators*: Equipping users with the knowledge to effectively utilise and interpret data presented on the Monitor.
- *Open Science Topics*: Providing insights on areas such as Open Access publishing, data management, and the EOSC. The exact topics will be refined post-project initiation based on feedback.

IReL will oversee the coordination, ensuring training sessions (in webinar format) align with the needs of stakeholders.

If there is significant interest, OpenAIRE is equipped to conduct "train the trainer" sessions. This approach equips participants with the ability to disseminate this knowledge within their organisations.

6. OA Status Report

The OA Status Report, a key project deliverable, will outline the current landscape of OA in Ireland. Its primary objectives are:

- **Baseline Analysis:** The report will provide a clear overview of OA in Ireland, covering both the national context and specific domains.
- **Data Evaluation:** Assessing the quality and coverage of the current data will be vital for a comprehensive understanding:
 - The OpenAIRE Graph will be used to identify existing data sources and potential gaps.
 - The quality and accuracy of data will be examined, with a particular emphasis on researcher affiliations.
 - The Metadata Validator will be deployed to check the completeness and FAIRness of records from repositories and OA journals.
- **Challenges & Recommendations:** Identifying issues and offering solutions will be central:
 - The report will highlight potential obstacles in long-term OA monitoring and other Open Science indicators.
 - Practical recommendations will be provided, including data validation techniques and enrichment workflows, aiming for continuous and consistent OA monitoring in Ireland.

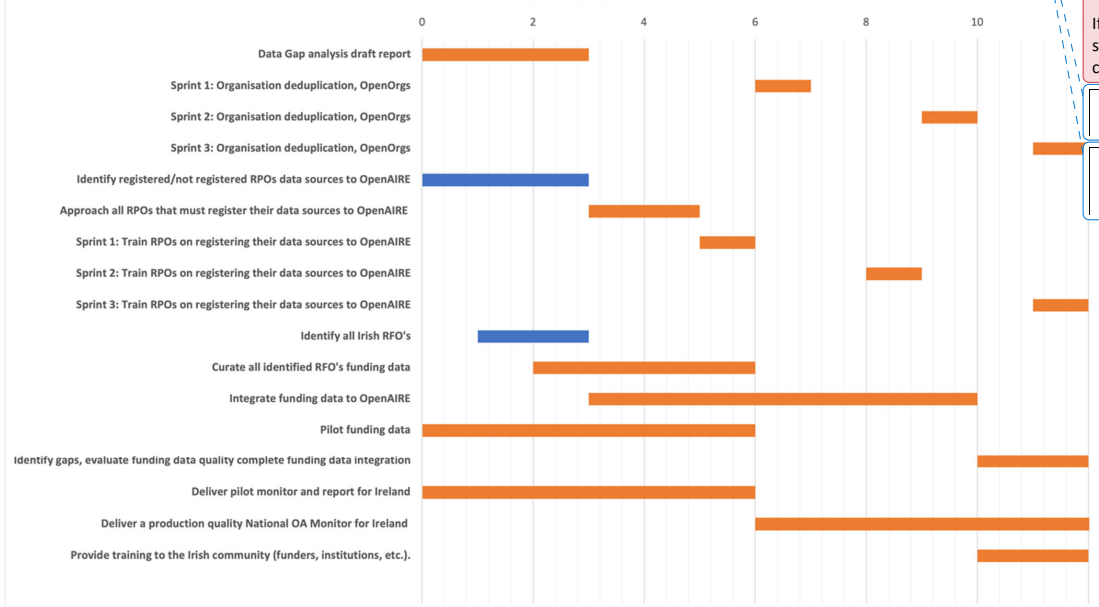
A first draft of this report will be provided to the Monitor Advisory Group on October 9th for feedback.

7. Timeline and Milestones

Lastly, The Gantt chart presented below presents the project timeline, showing progress by month and the respective milestones.

The blue-highlighted tasks signify points where OpenAIRE welcomes a list of stakeholders from IReL. IReL's provision of this list is a valuable suggestion for fostering enhanced collaboration and plays a pivotal role in assessing the quality and completeness of data integration within OpenAIRE Graph.

GANTT Chart



Commented [ig76R75]: Indeed, the list is merely a suggestion for enhanced collaboration, the Gantt chart still holds even without the provision of the list. Changed wording for clarity.

Commented [CF77R75]: Does this duplicate the request on page 23?

If not, perhaps a change to say that IReL will invite stakeholders to engage with OpenAIRE, to enable enhanced collaboration...

Deleted: asks marked in blue underscore the junctures where a list of stakeholders, provided by IReL,

Deleted: becomes pivotal. This list will enable us to assess the quality and completeness of data integration within OpenAIRE's Graph.

Page 11: [1] Commented [su13R12] suz.garrard@sfi.ie 18/09/2023 09:59:00

Can each organisation appoint more than one manager per RPO/RFO at the outset or will a single 'main' manager have to invite fellow managers manually after the fact?

Page 11: [2] Commented [CF14] Catherine Ferris 13/09/2023 13:41:00

My preference would be that the visual identify of the Monitor is consistent throughout and that RPO/RFO dashboards are not customisable in this way.

Question for Advisory Group: what's your preference?

Page 11: [3] Commented [su18R14] suz.garrard@sfi.ie 18/09/2023 10:05:00

I agree that adjusting sections/pages/tabs could disrupt the visual identity of the Monitor; however, I would be inclined to allow the modification of certain text descriptors to allow for orgs. to be clear in their contexts.

Page 11: [4] Commented [CF20] Catherine Ferris 13/09/2023 13:41:00

This will be challenging to manage from a consent perspective. OpenAIRE will need consent from each individual to document the changes those "fellow managers" make, and to share them publicly as part of the transparency requirements of the project. A "manager" providing access to a "fellow manager" without the "fellow manager" engaging in the consent process with OpenAIRE creates a loophole where consent is not obtained at the right time. Please reconsider how this process might be appropriately managed and update this section to reflect.

Page 11: [5] Commented [CF21] Catherine Ferris 13/09/2023 13:42:00

If I'm understanding this correctly, this means that if OpenAIRE doesn't identify an article as affiliated with an RPO/RFO from open data, a "manager" will have the ability to add it manually. Questions: (a) will the adding manually also be from open data only (b) we will require a public log of what has been changed, to ensure transparency of the process here. Please update the document to reflect this.

Page 11: [6] Commented [CF22] Catherine Ferris 13/09/2023 13:42:00

When "Repository" is referred to here, am I correct that this is referring to both Institutional Repositories and CRIS? As many of the RPOs use both, and OpenAIRE enables both CRIS and IRs to register with OpenAIRE, I'm not sure why it's not specifically called out here that CRIS can register - please provide clarity here on this.

Page 11: [7] Commented [CF24] Catherine Ferris 13/09/2023 13:42:00

Request re-framing this section with the context of the tender awarded e.g. the open data for the OpenAIRE Monitor will be derived from the OpenAIRE Graph. Repository Managers have the opportunity to proactively enhance the quality of the open metadata available within the OpenAIRE Graph by registering and integrating with OpenAIRE.



National Open Access Monitor, Ireland

Paving the road to 100% Open Access

Natalia Manola, CEO

Ioanna Grypari, Technical Project Manager

Leonidas Pispiringas, Scholarly Communication Technical Expert



Presenters



Natalia Manola

CEO



Ioanna Grypari

Technical Project Manager



Leonidas Pispiringas

Scholarly Communication
Technical Expert

Objectives of the Inception Report

- **Defining the Monitor:** Capture the scope and deliverables of the National Open Access Monitor, Ireland (“the Monitor”).
- **Project Roadmap:** Offer a detailed workplan.
- **Alignment & Understanding:** Foster shared perceptions and align expectations.

Outline of Presentation

The Monitor

- Dashboards & features
- Data & indicators
- Code, data deposition & documentation
- Engagement & training plan

OA Status Report

GANTT Chart

Introduction to the platform's user interface (UI)

Public dashboards

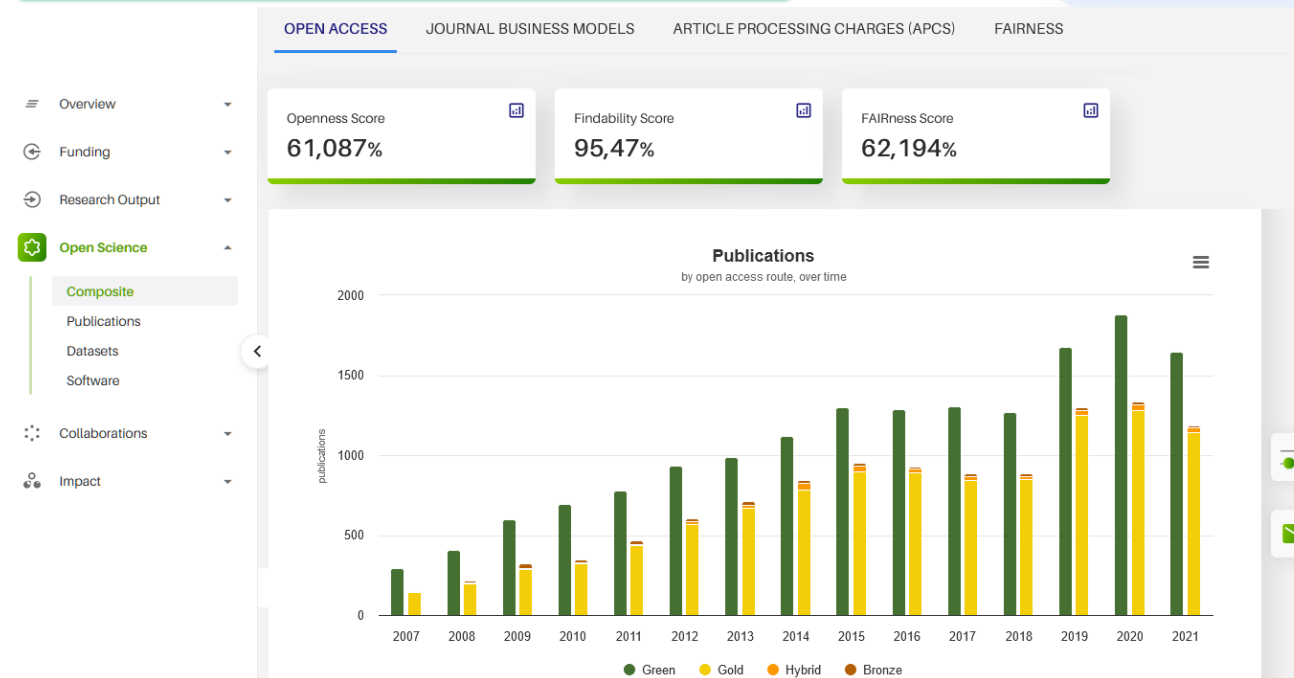
- National
- RPO (Research Performing Organisation)
- RFO (Research Funding Organisation)
- Researcher
- Repository

Monitoring in the Dashboards

1. Indicators View

- stakeholder level indicators broken down by aspects of interest
 - Understand overarching **patterns** and research **trends**.
 - Visualise large datasets with **clarity**.
 - Get a **comprehensive** view of the research landscape.
 - Essential for **strategic decision-making** and gauging overall **progress**.
 - Take a first look at monitor.openaire.eu

Indicator Visualisations & Filtering



Monitoring in the Dashboards

2. Research Outputs View

- Zoom into individual projects and publications with **access rights**, **open access types**, and other key metadata.
- A **granular** view that offers unique insights
- Instantly verify the **quality** and **accuracy** of individual research data.
- *Take a first look at: explore.openaire.eu*

Search & Browse Search Deposit Link Data sources Sign in

Advanced search

Search by title, author, abstract, DOI, orcid...

RESEARCH PRODUCTS (5,546,948) PROJECTS (3,308,945) DATA SOURCES (129,051) ORGANIZATIONS (194,180)

Filters [Clear All](#)

Access (1) [Clear](#)

- ☒ Open Access (5,546,948)

Type (4) [Clear](#)

- ☒ Publications
- ☐ Research data
- ☐ Research software
- ☐ Other research products

Document Type (31)

- ☐ Article (4,220,321)
- ☐ Other literature type (979,752)
- ☐ Preprint (544,086)

5,546,948 Research Products [DOWNLOAD RESULTS](#)

[PUBLICATIONS](#) [FROM 2022](#) [OPEN ACCESS](#)

Results per page: 10 Sort by: Relevance

1 2 3 4 5 >

Equiosmolar hypertonic saline and mannitol for brain relaxation in patients undergoing supratentorial tumor surgery: A systematic review and meta-analysis.

[Publication](#) » Article • 2022

Authors: [Ahmed S. Abdulhamid](#); [Abdullah A. Ghaddaf](#); [Abdullah F. Bokhari](#); [Yasir A. Alghamdi](#); +3 Authors

DOI: [10.25259/sni_136_2022](#) PMID: [35509546](#) PMC: [PMC9062934](#)

Background: Hypertonic saline (HS) and mannitol are hyperosmolar agents that are usually used to reduce intracranial pressure (ICP) and provide a satisfactory brain relaxation. The aim of the study was to perform a systematic review and meta-...

[Surgical Neurology I...](#) [Link to](#) [Share](#) [Cite](#) [Claim](#) [HELP](#)

Monitoring in the Dashboards

2. Research Outputs View

- Zoom into individual projects and publications with **access rights**, **open access types**, and other key metadata.
- A **granular** view that offers unique insights
- Instantly verify the **quality** and **accuracy** of individual research data.
- *Take a first look at: explore.openaire.eu*

Zoom-in Research Outputs

Frontiers in Cardio...
View all 3 versions
Link to
Share
Cite
Claim

Interaction Analysis of Abnormal Lipid Indices and Hypertension for Ischemic Stroke: A 10-Year Prospective Cohort Study.

Publication » Article • 11 Mar 2022 • Frontiers in cardiovascular medicine, volume 9 (issn: 2297-055X, [Copyright policy](#))

Authors: [Wei, Lai](#); [Sun, Junxiang](#); [Xie, Hankun](#); [Zhuang, Qian](#); [Wei, Pengfei](#); [Zhao, Xianghai](#); [Chen, Yanchun](#); [+5 Authors](#)

DOI: [10.3389/fcvm.2022.819274](#) PMID: [35360026](#) PMC: [PMC8962740](#)

Summary
Subjects
Metrics

Abstract

BackgroundDyslipidemia and hypertension are two important independent risk factors for ischemic stroke (IS); however, their combined effect on IS remains uncertain.ObjectivesThis present study aimed to evaluate the interaction effect of hypertension and abnormal lipid indices on IS in a 10-year prospective cohort in Chinese adults.MethodsThe cohort study of 4,128 participants was conducted in May 2009 and was followed up to July 2020. All qualified participants received a questionnaire survey, physical examination, and blood sample detection. Cox regression was used to evaluate the association of dyslipidemia and hypertension with IS, and calculate the hazard ratio (HR) and 95% confidence interval (CI). The relative excess risk of interaction (RERI) and the HR (95%CI) of interaction terms were used to examine additive and multiplicative interactions.ResultsIn the hypertensive population, Non-HDL-C ≥ 190 mg/dl, LDL-C/HDL-C ≥ 2 and HDL-C ≥ 60 mg/dl were statistically associated with IS, and after adjusting for covariates, HRs (95%CI) were 1.565 (1.007-2.429), 1.414 (1.034-1.933) and 0.665 (0.450-0.983), respectively. While in the non-hypertension population, no significant association of Non-HDL-C ≥ 190 mg/dl, LDL-C/HDL-C ≥ 2 , and HDL-C ≥ 60 was detected with IS (P ≥ 0.05). There was a significant association between TC/HDL-C ≥ 3.6 and the decreased risk of IS in the non-hypertension population, and the HR (95%CI) was 0.479 (0.307-0.75...

[View more >](#)

Monitoring in the Dashboards

1. Indicators View

- stakeholder level indicators broken down by aspects of interest
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 - Visualise large datasets with **clarity**.
 - Get a **comprehensive** view of the research landscape.
 - Essential for **strategic decision-making** and gauging overall **progress**.
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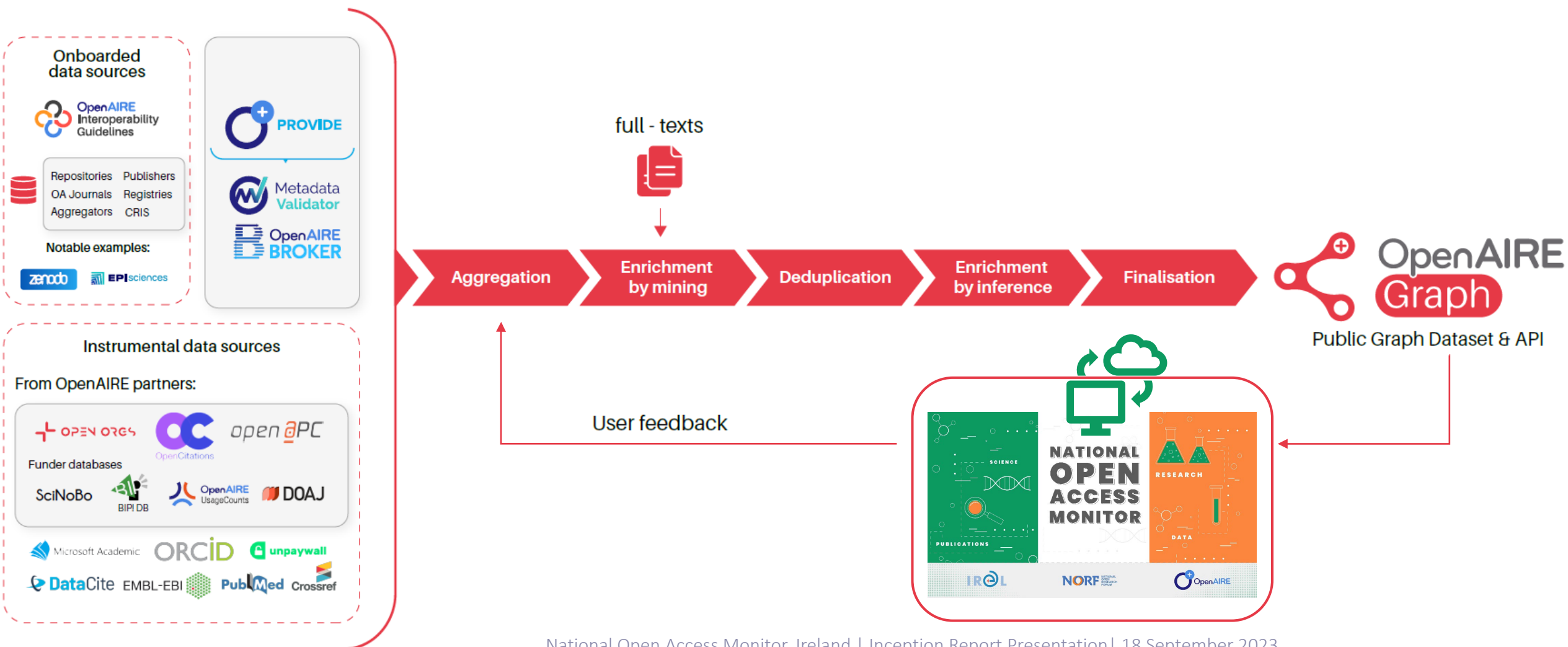
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 - Instantly verify the **quality** and **accuracy** of individual research data.
 - Take a first look at: explore.openaire.eu

Data Backbone: The OpenAIRE Graph

- A Scientific Knowledge Graph with timely and comprehensive coverage of research outputs
 - **129K** data sources, **3M** projects, and **235M** research outputs (publications, software, datasets, other research products)
 - **monthly** updates
- Precision, Depth & Processing
 - Rigorous **cleaning**, **deduplication**, and **enrichment** for optimal accuracy.
 - Enriched **metadata links**: Research results to projects, author affiliations, and classifications (FoS, SDG)
 - Techniques for **duplicate identification** in addition to OpenAIRE's curation tools
- Robustness & Openness
 - **Stability** ensured with maintenance, load balancing, backups, overseen by the OpenAIRE technology centre.
 - **Open** data and **transparent** methodologies

Seamless integration with the OpenAIRE Graph



National Dashboard

- The Monitor's **landing page**, showcasing Ireland's research landscape and Open Access (OA) progression.
- **Indicators View:**
 - Highlight **OA uptake** indicators.
 - Enable **cross-country** benchmarking.
 - Offer detailed **breakdowns** and **filtering** by RPO, RFO, year (range), and more.
- **Research Outputs View:**
 - Facilitates **browsing**, standard and advanced **searching**, and **filtering**.
- **National Dashboard Managers (IReL):** —————→
 - Access to the **Sandbox**: a beta interface with preliminary monitoring data and functionalities

The data in the Sandbox: OpenAIRE Graph's pre-release version (BETA) produced 2 weeks before the main release—serves as the initial checkpoint for data changes.

RPO & RFO Dashboards

- Comprehensive insights into each Irish RPO's and RFO's activities and OS performance.
- **Indicators View:**
 - Highlighting **OA uptake** indicators, enables **cross RPO/RFO** benchmarking.
 - Offers detailed **breakdowns** and **filtering**.
- **Research Outputs View:**
 - Facilitates **browsing**, standard and advanced **searching**, and **filtering**.
- **RPO/RFO Managers:** 
 - Access to the **Sandbox** to verify data quality (e.g., if a new repository is harvested, deduplication in OpenORGS, etc.)
 - Access to **OpenORGS** tool to deduplicate organization name (RPOs)
 - RPO/RFOs should **assign managers to give access to sandbox**

Users can work with us one-on-one for data quality improvements.

Dashboard Customisation Note:
While we initially considered letting RPO/RFO managers customise titles and other elements, the consensus is to maintain a consistent visual identity and not offer those functionalities.

OpenORGs: a Tool for Organization Disambiguation

Duplicates			
Related organization	Acronym	Country	Source
NATIONAL UNIVERSITY OF IRELAND MAYNOOTH PID (PIC): 999901415 URL: http://www.nuim.ie legal body legal person non profit research organization higher education	NUIM	IE	Original Id: corda_____: :999901415 OA Graph Node ID: corda_____: :18fbbeeb8d74b0b5288b88fd10398b2 [try] Provenance: CORDA - COmmon Research DATA Warehouse
NATIONAL UNIVERSITY OF IRELAND MAYNOOTH PID (PIC): 999901415 URL: http://www.nuim.ie legal body legal person non profit research organization higher education	NUIM	IE	Original Id: corda__h2020_: :999901415 OA Graph Node ID: corda__h2020_: :18fbbeeb8d74b0b5288b88fd10398b2 [try] Provenance: CORDA - COmmon Research DATA Warehouse - Horizon 2020
NATIONAL UNIVERSITY OF IRELAND MAYNOOTH PID (PIC): 999901415 URL: http://www.nuim.ie legal body legal person non profit research organization higher education	NUIM	IE	Original Id: corda____he: :999901415 OA Graph Node ID: corda____he: :18fbbeeb8d74b0b5288b88fd10398b2 [try] Provenance: CORDA - COmmon Research DATA Warehouse - Horizon Europe
Maynooth University PID (ROR): https://ror.org/048nfjm95 URL: https://www.maynoothuniversity.ie/	Maynooth University	IE	Original Id: fairsharing_: :org: :1797 OA Graph Node ID: fairsharing_: :7a970c4bdab6c7e658dc222e5d983445 [try] Provenance: FAIRsharing
National University of Ireland, Maynooth URL: http://www.maynoothuniversity.ie/	NUI Maynooth	IE	Original Id: opendoar____: :National_University_of_Ireland,_Maynooth_IE OA Graph Node ID: opendoar____: :922fea5b6f3546d4bffc8244665c76ab [try] Provenance: OpenDOAR
Maynooth University PID (OrgReg): IE0005 URL: https://www.maynoothuniversity.ie/	NUIM	IE	Original Id: orgreg_____: :IE0005 OA Graph Node ID: orgreg_____: :0da9c1375457d037e2b3f0542e7a5f9b [try] Provenance: OrgReg
Maynooth University PID (ROR): https://ror.org/048nfjm95 URL: https://www.maynoothuniversity.ie/ non profit		IE	Original Id: re3data_____: :39405149c39f57ccc7a9a7025d28476a OA Graph Node ID: re3data_____: :c7cb28f6b08650c73612dd61c77fce87 [try] Provenance: Registry of Research Data Repository
National University of Ireland, Maynooth PID (FundRef): 501100001633 PID (OrgRef): 436773 PID (ROR): https://ror.org/048nfjm95 PID (GRID): grid.95004.38 PID (ISNI): 0000 0000 9331 9029 PID (Wikidata): Q2601879 URL: https://www.maynoothuniversity.ie/	NUIM	IE	Original Id: ror_____: :https://ror.org/048nfjm95 OA Graph Node ID: ror_____: :0e606db0f209db7da94e11cc3e056a55 [try] Provenance: ROR

Researcher Dashboard

- Seamless integration with ORCID, each researcher profile anchored to ORCID iD
- **Indicators View:**
 - Open Science performance metrics
- **Research Outputs View:**
 - Facilitates **browsing**, standard and advanced **searching**, and **filtering**.
- **Logged-in Section (via ORCID iD)** —————→
 - Authorize OpenAIRE to enhance ORCID profiles.
 - Identify & **CLAIM** research outputs for addition to both Monitor and ORCID (with granted permission).

For updates to personal data, researchers can update their ORCID profile. Changes will be reflected on the Monitor after the subsequent monthly OpenAIRE Graph update.

Integration with ORCID & CLAIM functionality

ORCID

Authorize access

You are currently signed in as:


Ioanna Grypari

<https://orcid.org/0000-0002-7485-1591>

[Sign out](#)

[OpenAire2020 Portal](#) ?

has asked for the following access to your ORCID record:

 Get your ORCID iD

Authorize access

Deny access

If authorized, this organization will have access to your ORCID record, as outlined above and described in further detail in [ORCID's privacy policy](#).

You can manage access permissions for this and other Trusted Organizations in your [account settings](#).


Search Deposit Link Data sources

Add, delete or edit work in your ORCID record

Please grant OpenAIRE to access and update your ORCID record and works.

[CANCEL](#) [GRANT OPENAIRE](#)


OpenAIRE Research Graph: Dump of funded products

 **Research Data** » Dataset • English • Zenodo • EC | OpenAIRE Nexus

Authors: *Manghi, Paolo; Atzori, Claudio; Bardi, Alessia; Baglioni, Miriam; +14 Authors*

DOI: [10.5281/zenodo.6634431](https://doi.org/10.5281/zenodo.6634431)

This dataset contains the metadata records about research products (research literature, data, software, other products) with funding information available in the OpenAIRE Research Graph produced on May 2022. Records are grouped by funder...

 **ZENODO** [Link to](#) [Share](#) [Cite](#) [Claim](#)


Works (8) [Add](#) [Sort](#)

☐ Select all (8) Items currently selected (0) **Actions**

☐ **OpenAIRE Research Graph: Dump of funded products** [Only me](#)

Data set
DOI: [10.5281/zenodo.6634431](https://doi.org/10.5281/zenodo.6634431) [Show more detail](#)


CONTRIBUTORS: Manghi, Paolo; Atzori, Claudio; Bardi, Alessia; Baglioni, Miriam; Schirwagen, Jochen; Dimitropoulos, Harry; La Bruzzo, Sandro; Fofoulas, Ioannis; Czerniak, Andreas; Horst, Marek et al.

Source:  Argiro Kokogiannaki via OpenAIRE Explore [Remove](#)

43 Research Products (1 rule applied) [DOWNLOAD RESULTS](#)

Results per page: 10 Sort by: Relevance


[OpenAIRE Research Graph: Dump of funded products](#)

 **Research Data** » Dataset • English • Zenodo • EC | OpenAIRE Nexus

Authors: *Manghi, Paolo; Atzori, Claudio; Bardi, Alessia; Baglioni, Miriam; +14 Authors*

DOI: [10.5281/zenodo.6634431](https://doi.org/10.5281/zenodo.6634431)

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 **ZENODO** [Link to](#) [Share](#) [Cite](#) [Remove](#)

OpenAIRE Research Graph: Dumps for research communities and

You have successfully added work "OpenAIRE Research Graph: Dump of funded products" in your ORCID record!

Repository Dashboard

- **Indicators View:**

- Metrics and indicators on research output.
- Offers detailed **breakdowns** and **filtering**.

- **Research Outputs View:**

- Facilitates **browsing**, standard and advanced **searching**, and **filtering**.

Discussion from Sprint Meeting: Is there a need for a repository dashboard? Doesn't the RPO dashboard suffice?

Optional

Full Functionality for Repositories registered in OpenAIRE:

- Access to OpenAIRE PROVIDE Service dashboard.
 - Register, validate (including FAIRness checks), and enrich records (via OpenAIRE BROKER).
 - Pre-requisite to align with the OpenAIRE Guidelines.
 - Enrich their records' metadata from other sources harvested by OpenAIRE.
- Usage Counts Service activation allows:
 - Enrichment of the dashboard with usage reports for views and downloads data.

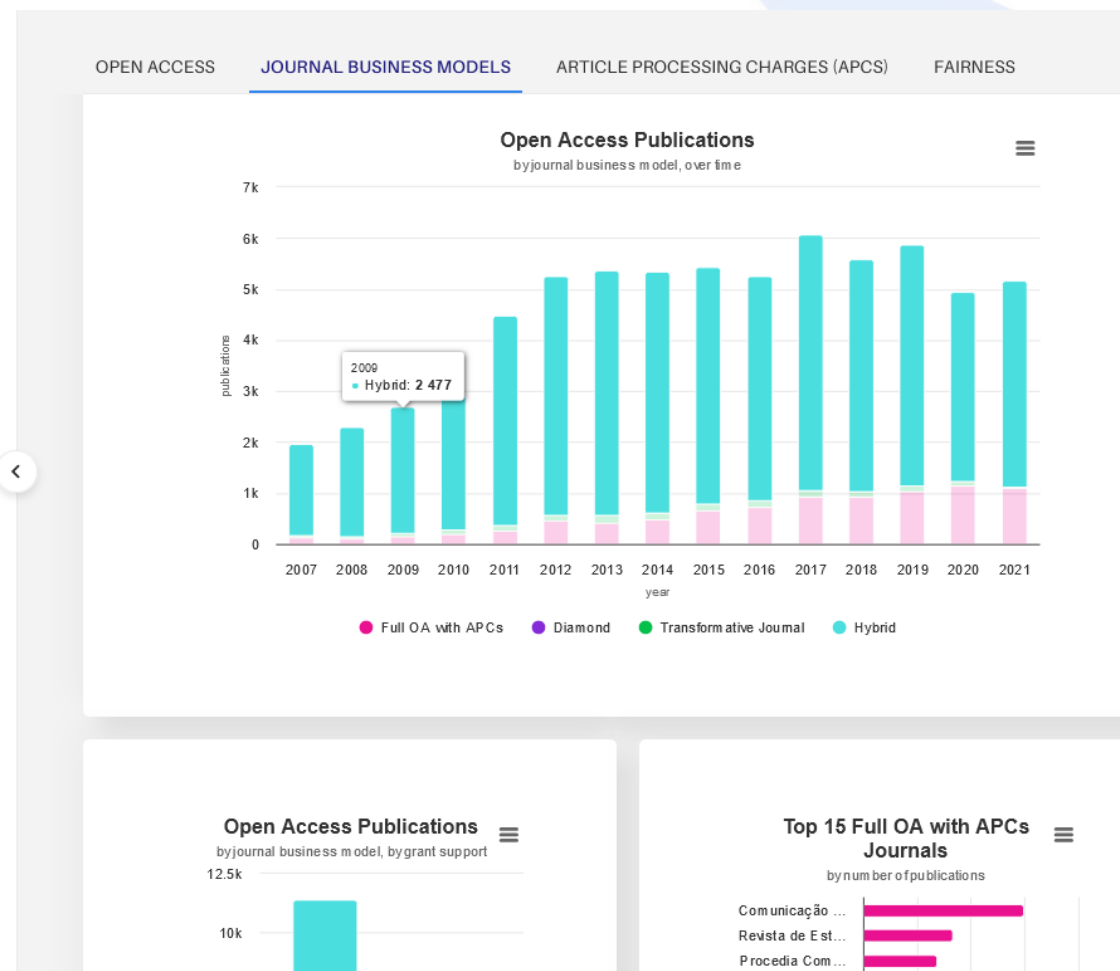
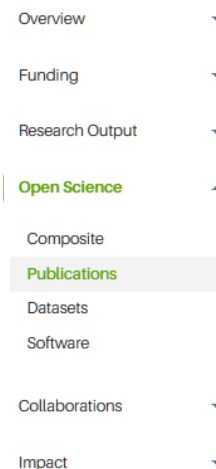
Common Features: Filtering the Data

• Indicators View

- Combination Strategy for visual clarity
 - Visualizations with Indicator breakdowns
 - Additional filtering (selected filter applied to entire dashboard)

Requirements for drill-down functionality:

- *RFO, RPO & RPO of corresponding author, year of publication, subject or keyword, publisher, grant award ID, combinations of above.*
- * *Availability of elements & their data quality to be presented in OA Status Report.*



Common Features: Filtering the Data

- **Research Outputs View**
 - Advanced search & additional filtering

The screenshot displays the OpenAIRE Advanced Search interface. On the left, the 'SEARCHING FIELDS' dropdown is open, showing options: PID, Project, Publication Date, Publisher, and Research community. The 'TERMS' section has two input fields for keywords, separated by an 'and' operator. A 'SEARCH' button is at the bottom of the search bar.

On the right, the 'Filters' section shows 'Access (1)' with 'Open Access (69,523,197)' selected. Below this, 'Type (4)' is shown with 'Publications' selected. The 'Document Type (33)' section lists various types with their counts: Article (49,692,285), Other literature type (9,774,416), Preprint (3,519,997), Conference object (2,975,176), Research (1,939,218), and Master thesis (1,852,612). A 'Year range' filter is set from 1800 to 2033.

The main results area shows '69,523,197 Research Products'. Two tabs are visible: 'PUBLICATIONS' and 'OPEN ACCESS'. The first result is a publication titled '[A case of so-called progressive gangrenous rhinitis]' by Takashi Matsunaga, published in 1963. The second result is a publication titled 'Equiosmolar hypertonic saline and mannitol for brain relaxation in patients undergoing supratentorial tumor surgery: A systematic review and meta-analysis.' by Ahmed S. Abdulhamid et al., published in 2022.

Common Features: Exporting & Integration

- **Data Exporting & Downloads:**
 - Download **research product data** and **indicators**.
 - Above 2,000 entries, redirected to **monthly Monitor data dumps** in Zenodo.
 - Direct **download links** for OA research products.
 - Access **OpenAIRE API** to download Monitor data.
 - Integrate Monitor Data with RFO or RPO platforms via APIs and standard protocols.
- **Visualization Download & Integration:**
 - **Download** visualizations in PNG, SVG, JPEG, PDF.
 - **Embed** them to other websites.

Common Features: Custom Comparison & Linking Functionality

- **Upload and compare** a list of DOIs (max 100) to check presence in the Monitor and view Open Access types and other key metadata.
- **Log in** (EDUGAIN, ORCID, Google, GitHub, LinkedIn, OpenAIRE) to access the **LINKING** functionality
 - Enables users to associate **research outputs** with **projects, communities, or other outputs**, enhancing data representation in OpenAIRE Graph and Monitor.
 - Links show up in next OpenAIRE Graph update.
 - A **log** will be **publicly visible** with all added links, with **permission** asked during linking final step.

Linking Functionality

FIND SOURCES

LINK SOURCES TO ENTITIES

SUMMARIZE AND FINISH



pisingas



Openaire (29)

Crossref (2)

Datacite (29)

Orcid (17)

YEAR RANGE ▾

TYPE ▾

FUNDER ▾

ACCESS ▾

DOCUMENT TYPE ▾

Introduction to the ORCID Greek Consortium

Publication • ORCID • 2019

Pisingas, Leonidas

OWeek: OpenAIRE MONITOR: Institutional Dashboard

Publication • Zenodo • 2022

Gypari, Ioanna; Pisingas, Leonidas

OWeek: OpenAIRE MONITOR: Institutional Dashboard

Publication • Zenodo

Gypari, Ioanna; Pisingas, Leonidas

Research data: accessible infrastructures and innovation

Publication • Zenodo • 2020

Pisingas, Leonidas; Chatzigeorgakidis, Georgios; Terrovitis, Manolis

Sources to link (1)

Link to (1)

[Upload a DOI's CSV file](#) ⓘ

Remove all

**OWeek: OpenAIRE MONITOR: Institutional Dashboard**

Gypari, Ioanna; Pisingas, Leonidas



FIND SOURCES

LINK SOURCES TO ENTITIES

SUMMARIZE AND FINISH



SOURCES (1)

[Edit sources](#)**OWeek: OpenAIRE MONITOR: Institutional Dashboard**

Publication • Zenodo

Gypari, Ioanna; Pisingas, Leonidas



LINK TO (1)

[Edit entities](#)**OpenAIRE Nexus**

Project • 2021-2023

Funder: EC Project Code: 101017452

[CONFIRM LINKING](#) →

Common Features: Support

- **Helpdesk**

- Users can **submit (private) feedback** directly through Monitor.
- Powered by Zammad for comprehensive issue tracking
- Dedicated section for the Monitor in [OpenAIRE Helpdesk](#)

- **Technical Support**

- **Redmine** ticketing system for swift issue notifications (requires login)
- Collaborative support between OpenAIRE's technical team and IReL's technical support contact.

Common Features: Documentation & Analytics

- **Documentation on Monitor**

- Dedicated **documentation pages** available on the Monitor.
- FAQs, terminology & construction, etc.
- Curated content to ensure clarity for all users.

- **Matomo Analytics Integration**

- Open-source solution to track service usage, produces detailed web statistics for user engagement.

Sample Documentation Page

The screenshot shows a documentation page for 'Composite scores'. The page layout includes a top navigation bar with links: 'Browse Dashboards', 'Resources', 'Support', 'About', and 'Sign in'. A left sidebar lists three sections: '1. Entities', '2. Inherited And Inferred Attributes', and '3. Constructed Attributes'. The main content area is titled 'Composite scores' and features a dropdown menu with 'METHODOLOGY' (selected) and 'INDICATORS'. Under 'METHODOLOGY', there are links for 'Methodological Approach', 'Terminology and construction', 'Funders', 'Research Initiatives', and 'Research Institutions'. The page displays two metrics: 'Openness Score' and 'Findability Score'. Each metric has a brief description and a detailed explanation of its calculation, which involves the OpenAIRE Graph and the Graph Production Workflow.

Data

Draft OA Status Report (due Oct 9) to examine data quality aspects in detail

- **Identifying Irish Research Outputs:** Comprehensive data collection from Irish **RPOs** and **RFOs** in OpenAIRE Graph & coverage evaluation
- **RPOs**
 - **Institutional repositories** in OpenAIRE Graph
 - **Harvested** metadata (e.g., Crossref)
 - Text mining via **inference system**
 - Via **CLAIM & LINK** functionalities
 - **OpenORGs** for name deduplication

Data

- RFOs
 - **CrossRef/Fundref.**
 - **Harvested metdata** from repositories, OA Journals, CRIS systems.
 - Via **LINK** functionality
 - Data exchanges with **EC's** IT systems.

Optional

Text mining for funders that have joined OpenAIRE (30+ have joined including **SFI**)

- Funders provide project data and we develop custom funding classifiers to establish links between their projects, and research outputs.
- Extensive curation (>98% precision) → improved data quality for RFOs within the Graph.

Refining the Monitor Dataset

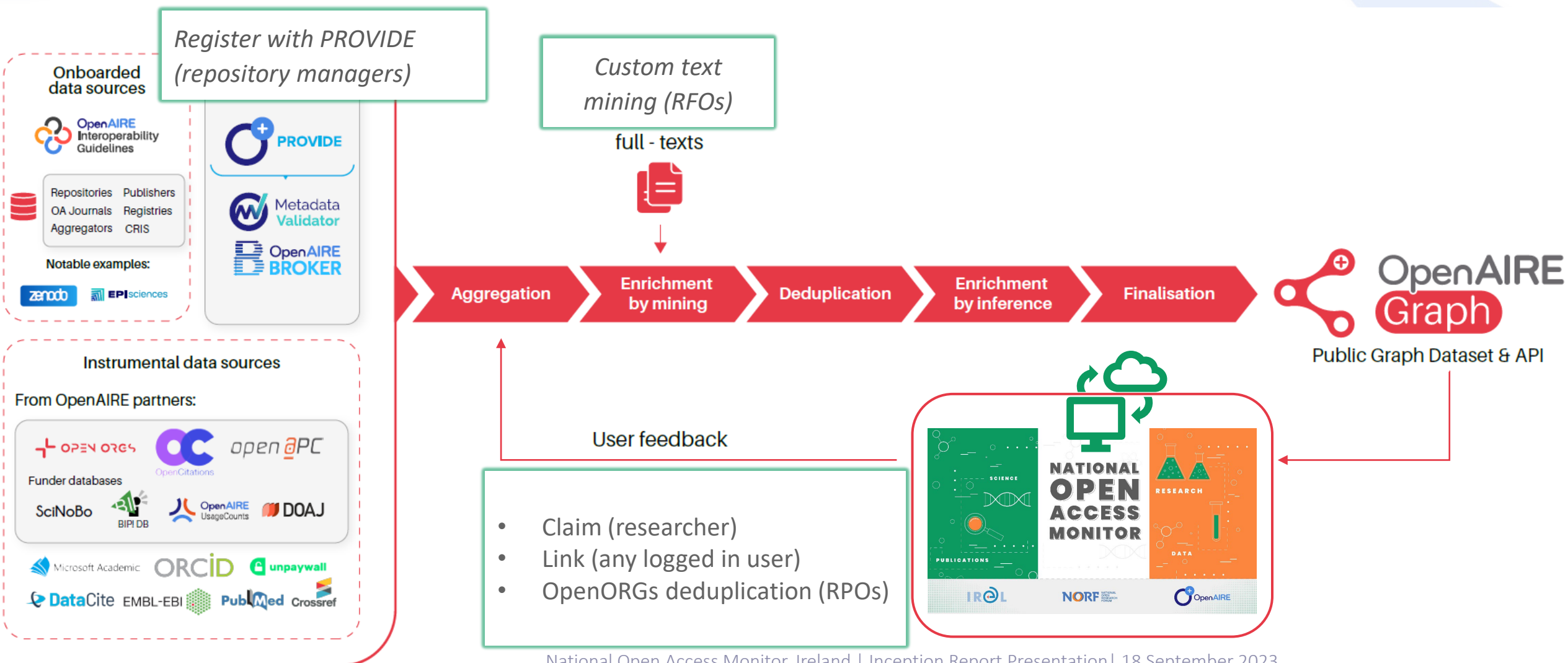
- **Criteria**

- **Irish** RPOs, RFOs
- **PIDs** in research output metadata
- **TO BE ADDED AS A PRE-SELECTED FILTER: Peer-reviewed** publications and conference proceedings.
 - DOI from **Crossref**
 - Publication types of merged record **not only grey literature**
 - “Enough” **number of references** (endogenously determined by algorithm based on domain)

Data Disambiguation

- Deduplication in OpenAIRE
 - OpenAIRE Graph merges duplicate records of the same scholarly work. The deduplication process: <https://graph.openaire.eu/docs/graph-production-workflow/deduplication/>
- Organizations
 - Organizations in OpenAIRE are aggregated from different data sources
 - Deduplicated using the OpenOrgs platform
 - Designated RPO managers will have access
- Journals, Publishers and Licenses disambiguation
 - Disambiguate journals using the ISSN
 - Disambiguate publishers through Crossref metadata (ROR ids, DOI prefixes, et al)
 - Normalize licenses& custom text similarity algorithms

Summary: OPTIONAL Data Quality Enhancements



Indicators (M6)

Draft OA Status Report (due Oct 9) to examine data quality aspects in detail.

- Open Science Indicators:
 - Access rights, Open Access types (Green, Gold, Hybrid, Bronze, Closed)
 - Diamond vs OA with APCs
 - Unrealised Open Access
 - Embargoed vs. Immediate Open Access
 - APCs, Plan S, Transformative Agreements
- Bibliometrics:
 - Citations, Views, Downloads
- Breakdowns:
 - year, publications type, RPO, RFO/publicly-funded, publisher, data source type, domain,

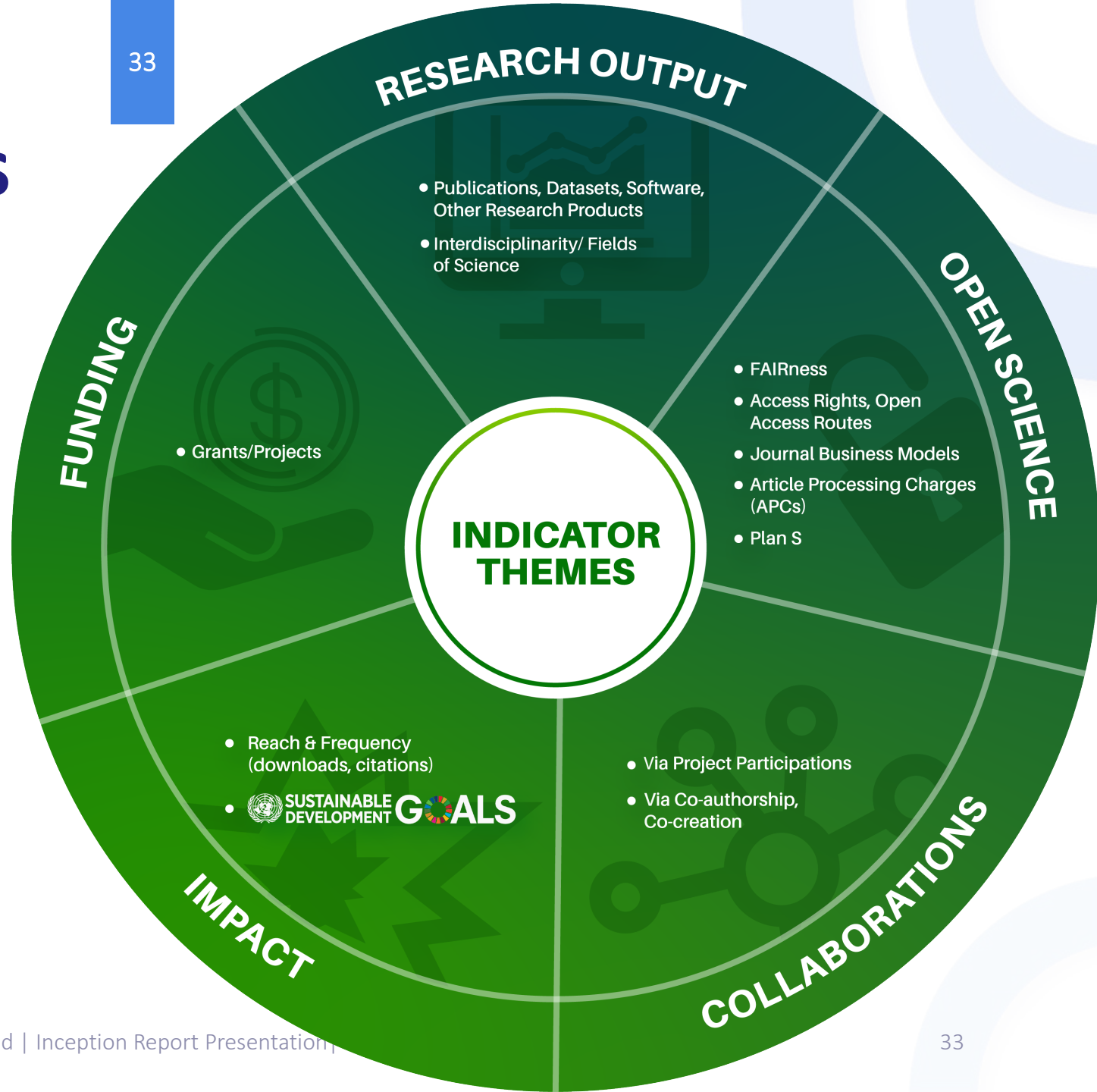
Indicators - Historical Snapshots

- **Aim:** Understand and showcase open science uptake progress.
- Initiating historical snapshots at **Month 6**.
- **Monthly** captures to identify trends.
- Visualizing growth/change through **trendline charts**.

Optional Additions (M6-M12)

e.g.

- **FAIRness** indicators
- **Collaboration** indicators
- **OS composites**
- **Interdisciplinarity**



Code, Data Deposition and Documentation

Transparency & Open Science Standards:

- Processes, data, code (including existing frameworks, APIs or libraries) and documentation to be deposited in Zenodo under an open license
- Data with **monthly updates**

Stakeholder engagement

- Active participation ensures:
 - The platform is relevant and inclusive
 - Added value to the Monitor service
 - High quality of the Monitor's data
- Inform RPOs about the merits of registering their data sources with OpenAIRE – *mini training session in Nov/Dec*
- Highlight the prospective advantages for RFOs in sharing project data with OpenAIRE (crafting specialised text mining algorithms linking projects to funded publications) – *mini training session in Nov/Dec*

Active Engagement

- Targeted stakeholder engagement, with specialized training sessions
- Equip with pivotal knowledge and skills, nurturing an integrated collaboration.
- Consent forms for participating Stakeholders to authorize the use, storage, and preservation of their contributions throughout the Monitor's development.
- Track all stakeholders' engagement to ensure that feedback is captured comprehensively and that every key stakeholder is aptly represented.

Training

- Training plan for the Monitor
- Mini-Training Sessions for RFOs and RPOs to offer insights and guidance – **Nov/Dec**
- Additional On-Demand Training Sessions based on feedback:
 - Platform Administration
 - Data Quality & Metadata Standards
 - Indicators
 - Open Science Topics
- Optional “train the trainer” sessions so that participants disseminate this knowledge within their organisations.

OA Status Report

- Deliver the first draft to Monitor Advisory Group on October 9th
- Outline the current landscape of OA in Ireland
- Primary objectives
 - Baseline analysis
 - Data Evaluation
 - Challenges & Recommendations

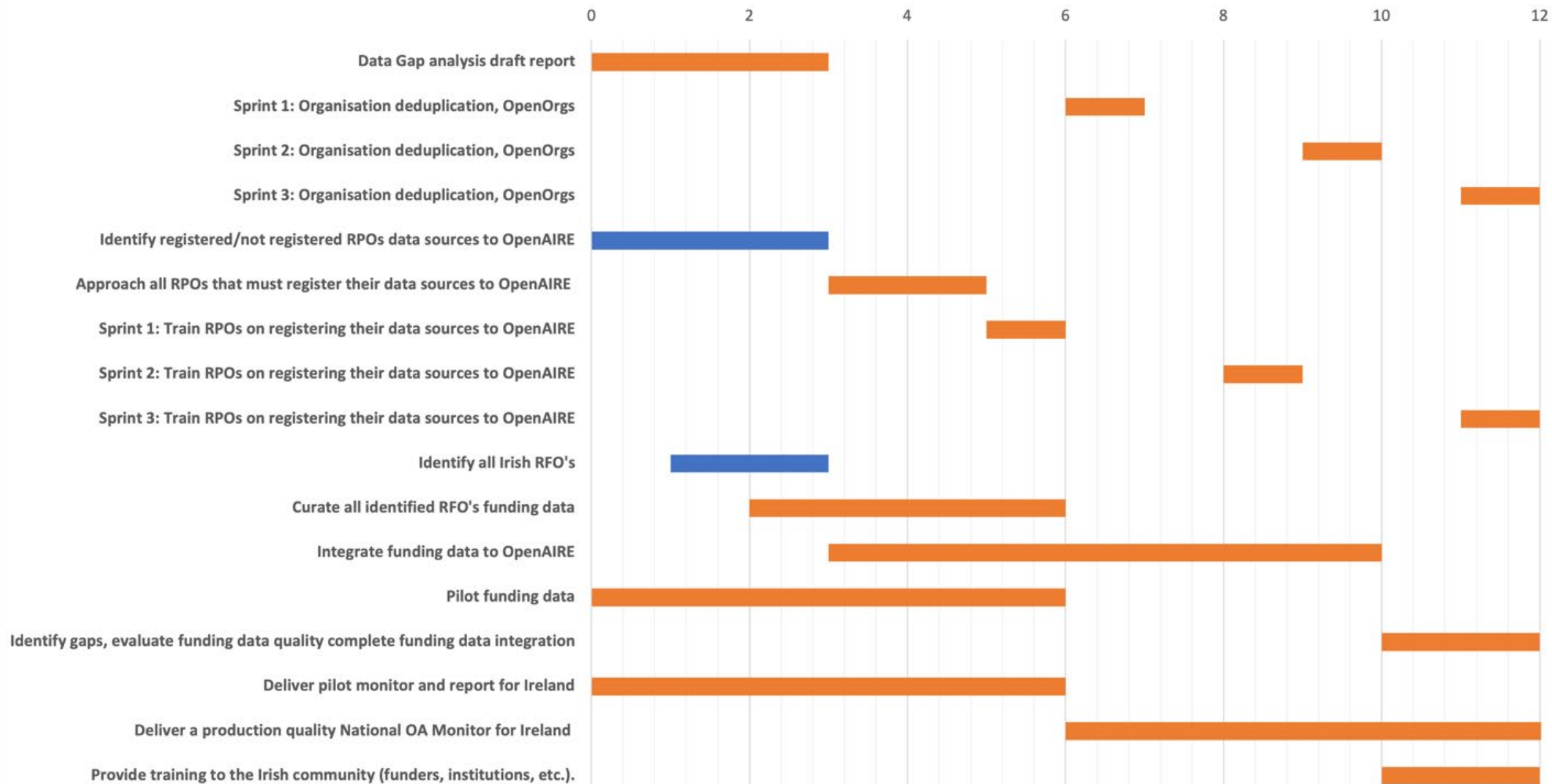
Baseline analysis & Data Evaluation

- Baseline analysis
 - Overview of OA in Ireland (national context and specific domains)
- Data Evaluation
 - Assess the quality and coverage of the current OA data
 - Identify existing data sources and potential gaps (OpenAIRE Graph)
 - Examine the quality and accuracy of data, emphasizing on researcher affiliations
 - Check the metadata completeness (thus FAIRness) of records from institutional repositories and OA journals (Metadata validator)

Challenges & Recommendations

- Highlight potential obstacles
 - Long-term OA monitoring
 - Open Science indicators
- Provide practical recommendations for continuous and consistent OA monitoring in Ireland
 - data validation techniques
 - enrichment workflows

GANTT Chart



Thank you!