

Workflow for Canadian Repositories Participating in the OpenAIRE COVID-19 Gateway

Prepared by the CARL Open Repositories Working
Group's Task Group on OpenAIRE

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Please direct any questions to openaire-adoption@carl-abrc.ca.

Workflow for Non-compliant Canadian Repositories Participating in OpenAIRE

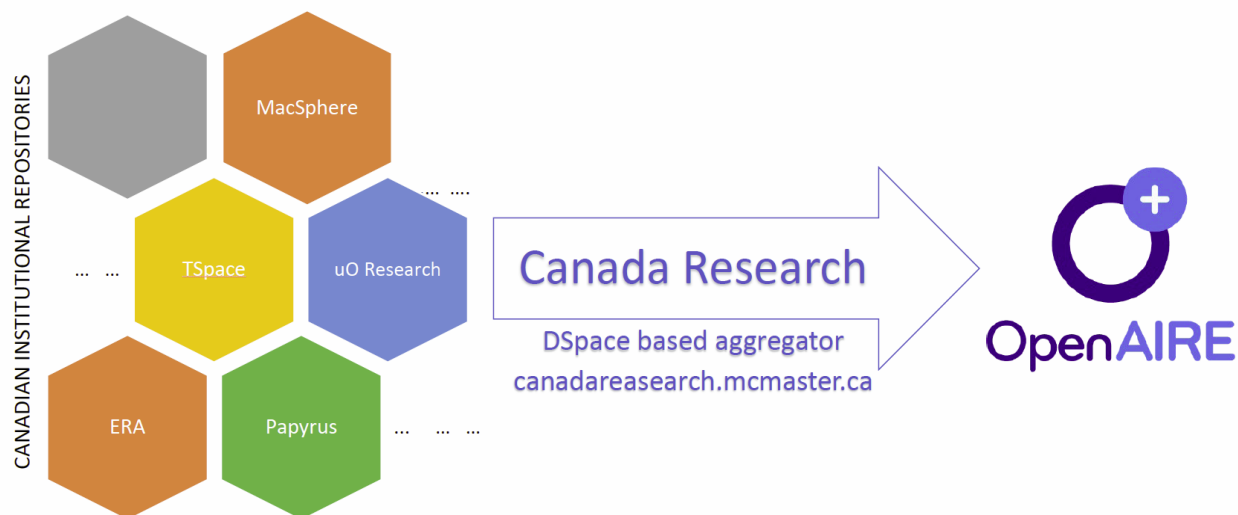
CARL Open Repositories Working Group (ORWG) OpenAIRE Task Group (2021-03)

[Canada Research](#) is a metadata aggregator based at McMaster University Library. Canada Research harvests records from non-compliant repositories and transforms their metadata so they can be, in turn, harvested directly from Canada Research by OpenAIRE.

The optimal scenario is that repositories are harvested directly by OpenAIRE – as this will allow them to benefit from services such as data enhancement, curation and brokering, the OpenAIRE dashboard services, and OpenAIRE Usage Statistics services. However, we are aware that for a number of reasons, some repositories will choose not to adopt the OpenAIRE Guidelines in their repository.

The aim of Canada Research is to ensure there is a pathway for non-compliant Canadian repositories to have their records available through the OpenAIRE Explore discovery service.

This workflow has been developed for institutional repositories and other literature repositories. The [Federated Research Data Repository](#) (FRDR) service, which is responsible for harvesting from Canadian data repositories, is already harvested directly by OpenAIRE.



The harvesting process:

Canada Research harvests Dublin Core metadata records from Canadian post-secondary institutional repositories once a week.

Canada Research is already successfully harvesting records from IRs using the following platforms:

- DSpace - using DSpace intermediary format
- Eprints - using Dublin Core
- CONTENTdm - using Dublin Core
- Islandora - using Dublin Core
- Two custom IRs - using Dublin Core

If you wish to be harvested by Canada Research, please contact: openaire-adoption@carl-abrc.ca.

The editing/curation process:

Some curation of the records metadata is required to ensure that your records are visible and findable using the OpenAIRE services. There are two possible scenarios for repositories being harvested by Canada Research for how to curate their metadata.

Scenario 1: Repository manager curates the metadata in Canada Research (preferred)

Once the records are harvested by Canada Research, the local repository manager is strongly encouraged to curate the metadata in the central aggregator in order to add granular funding information in compliance with OpenAIRE guidelines. The relevant fields containing funding information are:

Funder Identifier - `project.funder.identifier`

Funder Name - `project.funder.name`

Funder Grant - `oaire.awardNumber`

Award Title - `oaire.awardTitle`

Award URI - `oaire.awardURI`

For details on the fields above please consult [this document](#).

Learn how to edit the records in Canada Research [here](#).

Pros: This option allows adding granular funding information.

Cons: If the Canada Research project should come to an end, the enhanced metadata may be lost, although we can offer a metadata export.

Scenario 2: Repository manager curates the metadata in the IR

The repository manager ensures that the minimum metadata elements are included in the records in the local IR so that the aggregator will pick up the changes at the next harvest.

Minimum metadata elements:

- if applicable – Funder name or ID, e.g. FundRef (In “Funding Reference” or “dc.description.sponsorship” or “dc.contributor” field)
- if applicable – Grant or project name/number (In “Funding Reference” or “dc.description.sponsorship” or “dc.contributor” field)

Pros: The enhanced metadata stays with the original record.

Cons: For non-OpenAIRE-complaint IRs, this option does not allow adding granular funding information.

Note of Caution

If a record is edited in Canada Research, and then a new edit is performed on that record in the IR, the edits in the IR will overwrite the edits in Canada Research at the next scheduled harvest. Therefore, repository managers should be aware and take precautions to ensure that the records in Canada Research are reflected in the IR. (Note that even though this is the case, any funder information already submitted to OpenAIRE via Canada Research should remain.)