Implementing RIM (Research Information Management)

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Working Smarter in Higher Ed

With Research Information Management

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Research Information Management: Defining RIM and the Library’s Role

- Rebecca Bryant, OCLC Research
- Anna Clements, University of St Andrews
- Carol Feltes, Rockefeller University
- David Groenewegen, Monash University
- Simon Huggard, La Trobe University
- Holly Mercer, University of Tennessee, Knoxville
- Roxanne Missingham, Australian National University
- Maliaca Oxnam, University of Arizona
- Anne Rauh, Syracuse University
- John Wright, University of Calgary

OCLC Position Paper Released - October 18, 2017

- Provides an international framework for understanding RIM practices
- Synthesizes the value proposition of libraries in RIM service provision

• oc.lc/rim
What is Research Information Management (RIM)?

- Aggregation
- Curation
- Utilization

Faculty/Research Activities

RIM

An ecosystem, not a single system or platform
Increasingly more than the most “current” information
What is Research Information Management (RIM)?

Overlapping terms:
• CRIS (Current Research Information System)
• RIS (Research Information System)
• RNS (Research Networking System)
• RPS (Research Profiling System)
• FAR (Faculty Activity Reporting)

RIM is NOT:
• RIMs ≠ social networking platforms like ResearchGate or Academia.edu
• RIM ≠ Research Data Management (RDM)
Global Perspective – What is Driving RIM?

Drivers of RIM adoption

- Increasingly networked research information
- External mandates
- Globalization & competition

Competition

External Mandates

Networked Information

Movement towards “Open”
Where did we start?
RIM Metadata

- Research outputs
  - Patents
  - Grants & projects
  - Equipment
- Research information
  - Media reports
  - Statements of impact
  - Activities, service, awards
  - Instructional history
  - Researchers, affiliations, collaborators
## Teaching: Student Mentoring, Advising and Activities

<table>
<thead>
<tr>
<th>Student or Group Name</th>
<th>Activity Description</th>
<th>Start Semester</th>
<th>End Semester</th>
<th>Student Degree Level</th>
<th>Student Supervision Role</th>
<th>Student Committee Type</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Digital Scholarship GA position</td>
<td>Fall 2015</td>
<td>Ongoing</td>
<td>Masters</td>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>serves as the Cataloging GA for the Technical Report Archive &amp; Image Library (TRAIL)</td>
<td>Fall 2016</td>
<td>Spring 2017</td>
<td>Masters</td>
<td>Other</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>
## Activity Reports

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Report</td>
<td>Personal information, work experience, degrees, licenses, memberships, honors, interests, biographies, and more</td>
</tr>
<tr>
<td>Activity Input Report</td>
<td>Teaching (e.g. enrollment, credit hours), grants, service, professional development, consulting, and more</td>
</tr>
<tr>
<td>Scholarly Activities</td>
<td>Research, publications, and creative productions</td>
</tr>
<tr>
<td>Grants</td>
<td>Grant activities and funding data</td>
</tr>
<tr>
<td>Courses Taught</td>
<td>Enrollment, credit hours, teaching load, and course sections</td>
</tr>
<tr>
<td>Activities By Activity Classification</td>
<td>Activities grouped by classifications</td>
</tr>
</tbody>
</table>

## Administrative Reports

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Reports</td>
<td>Report building by selecting data to represent each column: faculty information, faculty classifications, activity input counts, and profile activity counts</td>
</tr>
<tr>
<td>Activity Overview - By Faculty</td>
<td>Activities by units and faculty members within those units</td>
</tr>
<tr>
<td>Activity Overview - By Semester</td>
<td>Activities by units and the semesters within those units</td>
</tr>
<tr>
<td>Faculty Classifications</td>
<td>Faculty members organized by classification rank, tenure status, and other faculty classifications</td>
</tr>
<tr>
<td>Scholarly Citations</td>
<td>Publications and creative productions by faculty members within units</td>
</tr>
</tbody>
</table>
Joellen L Russell

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Scholarly Contributions

Chapters

Libraries in Research Information Management

- Publications & Scholarship Expertise
- Training & Support
- Discoverability, Access & Reputational Support
- Stewardship of the Institutional Record
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Dean of University Libraries and Director of Emerging and Integrative Media Initiatives, Carnegie Mellon University
Carnegie Mellon University
Implementing RIM systems at Carnegie Mellon University - new opportunities for libraries
OCLC, Baltimore, 31 October 2017

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CREATING A 21ST CENTURY LIBRARY

STRATEGIC RECOMMENDATION

Create a 21st century library that serves as a cornerstone of world-class research and scholarship.

In a world where digital is becoming the default format for information, the library will remain a vital presence on campus, sustaining serious scholarship and providing opportunities for interactive research and study environments. To support this important work for students, faculty, and staff, and to create 21st century library spaces for 21st century learners, the library will:

- Develop information specialists as partners in research, teaching, and learning.
- Collaborate with peer institutions to provide coordinated access to a global collection of information resources.
- Steward the evolving scholarly record, and champion new forms of scholarly communication.
- Be recognized globally as a leader in the development of the scholarly information ecosystem.
DISCOVERING & PLANNING
- Researching scientific literature and patents
- Designing studies
- Procuring funding
- Managing reputations
- Measuring impact

EXPERIMENTING & MANAGING DATA
- Searching for collaborations
- Experimenting
- Managing and analysing data

DRIVING & ESTABLISHING IMPACT

AUTHORING PUBLISHING & DISSEMINATING FINDINGS
- Writing up findings
- Publishing article(s)
- Disseminating outputs and outcomes
ANNOUNCING THE PARTNERSHIP

DIGITAL SCIENCE
Strategic partnership announced

RESEARCH INFORMATION
Building the library of the future

LSE IMPACT BLOG
Reimagining the role of the library

DIGITAL SCIENCE PODCAST
The 21st century librarian
OPEN SCIENCE

The Open Science Framework - cos.io
Outcomes

Method

Evidence

Discussion

Discussion

Revision

Re-use

April 10 - 14: CELEBRATE National Library Week!

Join us for games, treats & buttons to learn how we can help you at every step of the research process.

**Discover**
MONDAY, 4/10
Hunt Library, 1-2:30pm

**Organize**
TUESDAY, 4/11
Sorrells Library, 1-3:00pm

**Create**
WEDNESDAY, 4/12
CUC, 11:30 - 1:30pm

**Share**
THURSDAY 4/13
Hunt Library, 11 am - 1:00 pm

**Impact**
FRIDAY 4/14
Scott Hall, 11:30 - 1:30 pm

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Developing an Integration with Institutional Repository & ORCiD Profile

Ryan Miller and Indira Yerramareddy
Knowledge Management
International Food Policy Research Institute (IFPRI)
OCLC Americas Regional Council
Oct. 30-31, 2017
Baltimore MD
Overview

- What is IFPRI
- Need for ORCiD
- Stages of Integration
- Status and Reception of Application
About IFPRI

Vision
A world free of hunger and malnutrition

Mission
To provide research-based policy solutions that sustainably reduce poverty and end hunger and malnutrition

Day-to-day work
- Conducting and communicating research
- Enhancing partnerships
- Building partners’ capacity

Established in 1975, IFPRI is an non-profit independent research institute and a member of the CGIAR Consortium
What is IFPRI

- International research organization that: “provides research-based policy solutions to sustainably reduce poverty and end hunger and malnutrition in developing countries. Established in 1975, IFPRI currently has more than 600 employees working in over 50 countries.”

- Institutional repository holds nearly 20,000 items spread across 9 collections.

- Our work includes books, briefs, journal articles, working papers, datasets, and online tools.
Need for ORCiD

- Staff encounters wide name ambiguity
  - Staff recruited internationally
  - Staff publish widely and encounter widely varying name conventions from publishers
- We endeavor to remain current and support our staff
  - They can bring an ORCiD profile to IFPRI
  - ORCiD profile goes with them
- Publisher’s requirements

1. R. S. Meinzen-Dick
2. RS Meinzen-Dick
3. Ruth Meinzen
4. Ruth Meinzen Dick
5. Ruth Meinzen-Dick
6. Ruth S Meinzen
7. Ruth S. Meinzen-Dick
8. Ruth Suseela Meinzen
9. Ruth Suseela Meinzen-Dick
Stages of Integration: Early

- Organizational participation
  - Identified opportunity in 2013/2014
  - Evaluated alternate IDs, confirmed ORCiD preferable

- Early script to auto enroll staff
  - Piloted with manual creation
  - Used early API to batch auto enroll using Python
  - Batch feature subsequently removed by ORCiD

- Add ORCiDs to publication
  - Added ORCiDs to existing publications in repository
  - Added to publications ongoing
Stages of Integration: Early

CONTENTdm data structure used to store ORCiD

- Three fields for ORCiD
  - Display for link + name
  - Dataentry for link + name (hidden)
  - Dataentry for number only (hidden)
Stages of Integration: Profile Provisioner

- Written in PHP and some Java Script
  - PHP used for interfacing with API
  - Java Script used for interface
- Hosted on AWS
- Implements ORCiD API version 2, and some 1.2
- Access:
  - Link available from intranet
  - IP restricted to IFPRI staff
  - Access through EZproxy is planned
Stages of Integration: Profile Provisioner

CONTENTdm API calls used

- dmGetCollectionFieldVocabulary – used to identify the users based on ORCiD

- dmQuery – used to retrieve all items within collection with ORCiD present
Stages of Integration: Profile Provisioner

ORCiD API calls used

- [https://api.orcid.org/v1.2/\%s/orcid-works/](https://api.orcid.org/v1.2/\%s/orcid-works/)

- [https://api.orcid.org/oauth/token](https://api.orcid.org/oauth/token)

- [https://api.orcid.org/v2.0_rc2/#!/Member_API_v2.0_rc1/createWork](https://api.orcid.org/v2.0_rc2/#!/Member_API_v2.0_rc1/createWork)
Application Guide

Screenshots

Authorize Application

1. Click the “Authorize posting to ORCID” button at the top right of the page.

2. On the next page, select “Sign In” next to “Already have an ORCID ID?”

Use ORCiD login
IFPRI staff are given ORCiDs based on their IFPRI email address
Searching in the Application

- In the search box, type your first or last name. You can also browse the list of researchers by clicking in the search box and scrolling through.
  *If you have authorized your account already, your name will appear highlighted in green. If it is not highlighted, follow the instructions on authorizing your account to proceed with adding publications to ORCID.
- Clicking on your name will take you to a list of publications from the repository from internal [IFPRI Publications] or external [Journal Articles] collections. You can select the desired collection next to the search box.

  ![Type to search / or select author](Type to search / or select author)
  ![IFPRI Publications](IFPRI Publications)
  ![Journal Articles](Journal Articles)

- While on the results page, you can switch between collections to view an author's internal and external works in the eBrary.
Application Guide Screenshots

Search Results explained

- At the top: Author name, ORCID ID (which links out to the ORCID profile), and search results collection

- Publications: eBrary results in left column (total number) | ORCID records displayed in right column

- There are three possible displays for eBrary publication results: record matched in ORCID (green), title match in ORCID (blue), and no match (not highlighted).

- More information about records both from the eBrary and in ORCID can be seen by clicking the + next to a publication title.
Application Guide Screenshots

Adding a publication to ORCID

1. Check to make sure the eBrary record does not already exist in ORCID. This can be done by noting the color of the result (green is in ORCID, blue is a title match, no color means there is no match). Results that are blue and free of color may still be in ORCID, with a title spelled slightly different or no DOI for the app to match. Duplicate titles in the eBrary likely come from various manifestations of a work: a conference paper, working paper, journal article, and book chapter may all have the same or similar titles. It is up to you which, if any or all publications are added to your ORCID Profile.

2. Click on the next to a publication title from the eBrary to expand the information.

3. Make sure the name(s) of the author(s) to be added to ORCID are selected in the metadata of the record. [By default the author whose search results are listed is selected, if you are authorized to add to other author’s ORCID profiles, then their names may be selected too]

4. Click "Add record to ORCID"

5. Repeat steps 1-4 for the publications that should be pushed to ORCID.
Thank You

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