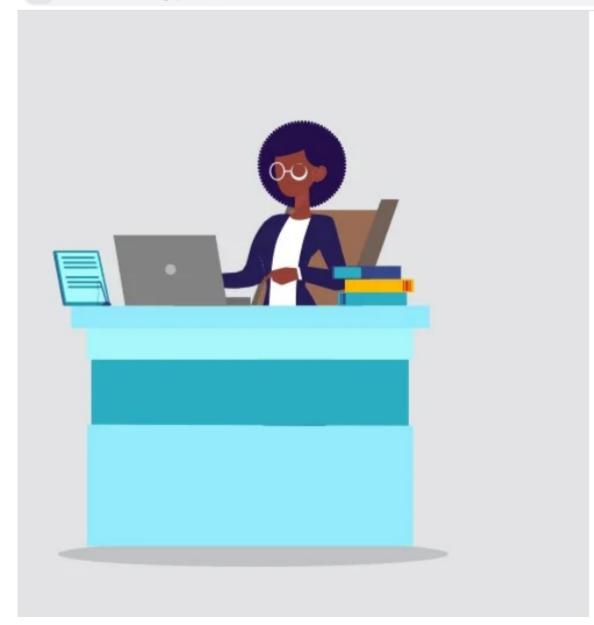
oaswitchboard

Webinar

21 March 2023

Topics for today:

- 1. Welcome
- 2. Context
- 3. Eight tutorials
- 4. Future developments & Further training
- 5. How do I sign up and get an account?



Live consortia and multi-site participants

Consortia and multi-site participants (jointly representing hundreds of sites/members):

- 1. Bibsam Consortium
- 2. Big Ten Academic Alliance (BTAA)
- 3. California Digital Library
- 4. Columbia University Libraries
- Consortium Luxembourg / BNL National Library of Luxembourg
- 6. EIFL (Electronic Information for Libraries)
- 7. German National Libraries (TIB, ZBW & ZB MED)
- 8. Jisc
- 9. Max Planck Digital Library
- 10. Norwegian Sikt Consortium
- 11. VSNU/UKB

All individual research institutions/libraries (participants with an active account) are listed <u>here</u>.

2. Context

OA Switchboard central metadata exchange hub

The OA Switchboard is a mission-driven, community led initiative designed to simplify the sharing of information between stakeholders about open access publications throughout the whole publication journey

for research institutions, libraries and consortia

who want to: connect with their research and simplify their workflows

Read more

for academic publishers

who want to: support a smooth and compliant author journey and report on OA publication output

Read more

for research funders

who want to: demonstrate the extent and impact of their research funding and deliver on their commitment to OA

Read more

for research institutions, libraries and consortia

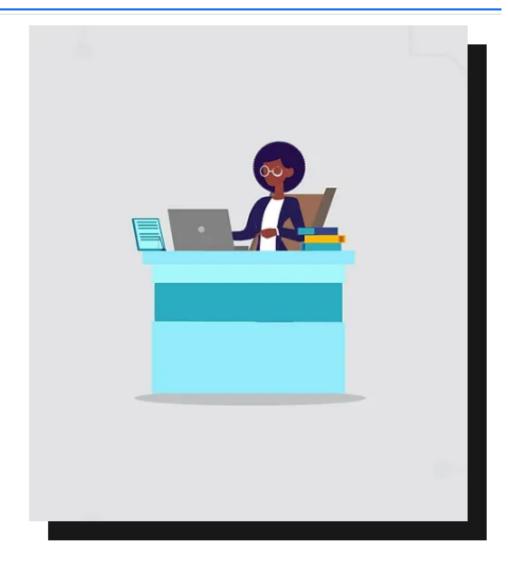
who want to:

connect with their research and simplify their workflows



- Reporting Made Easy
- 2. Matching Publication Costs with Publication Funds

Get inspired by participating institutions' Cases, Testimonials and Interviews.



for research institutions, libraries and consortia

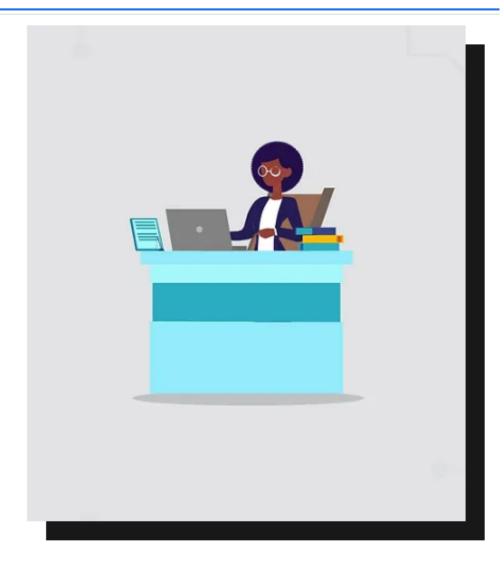
who want to:

connect with their research and simplify their workflows



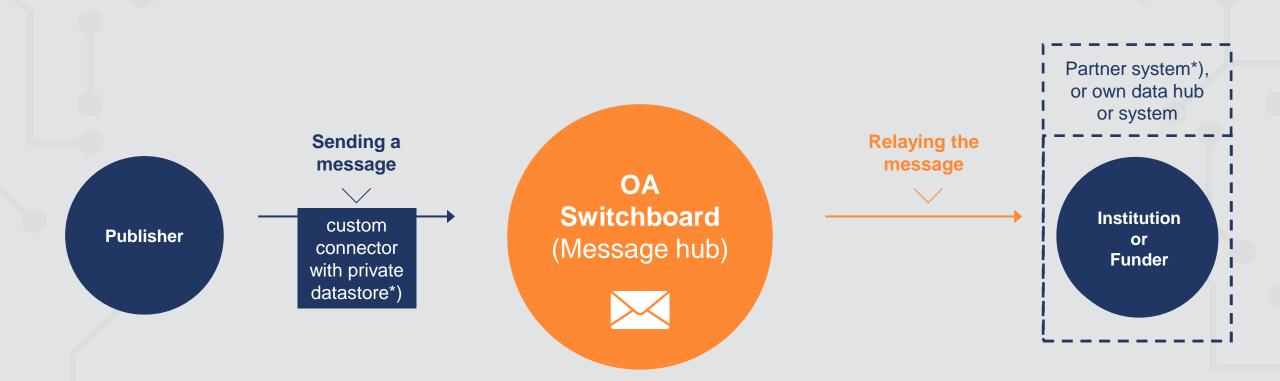
- 1. Reporting Made Easy
- 2. Matching Publication Costs with Publication Funds

Get inspired by participating institutions' <u>Cases, Testimonials</u> and <u>Interviews</u>.



USE CASE 1: Reporting Made Easy

Publication notification (P1-messages)



Who is interested in receiving publication notification 'messages' and/or aggregated reports?

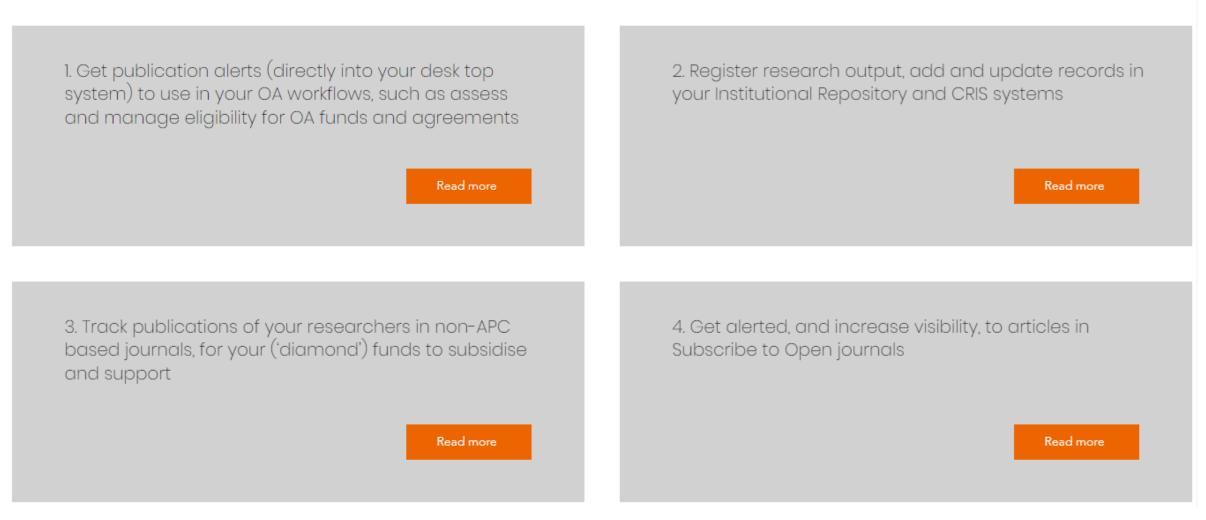


Consortium management



For Applications & Case Studies: https://www.oaswitchboard.org/applicationscasestudies

Workflow & Decision Support - institutions



...and more!

For Applications & Case Studies: https://www.oaswitchboard.org/applicationscasestudies

Data Analysis

Trusted data for analysis by all parties, for many different purposes

1. Connecting with your research (static report for research funders, institutions and consortia)

2. Shed light on where your researcher activity intersects with library investments in equitable OA publishing (e.g. S2O and Diamond OA initiatives)

Read more

Who is interested in receiving publication notification 'messages' and/or aggregated reports?



6. As consortium, oversee agreements with publishers, monitor uptake and compliance, and allocate cost over members

Read more

3. Eight tutorials





Tutorials

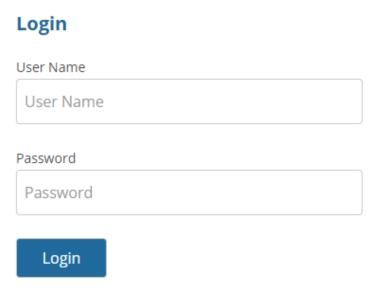
1. How do I log in and navigate the dashboard? 2. How do I read a PI-message in the user interface? Watch tutorial 1 Watch tutorial 2 3. How do I read a PI-message in the email alert? 4. How do I export and use the Excel report? Watch tutorial 3 Watch tutorial 4 5. How do I use the JSON export? 6. Which data fields are in a PI-message? Watch tutorial 5 Watch tutorial 6 7. How does the OA Switchboard router work? 8. Why do I receive this PI-message? Watch tutorial 7 Watch tutorial 8

Tutorial

1. How do I log in and navigate the dashboard?



oaswitchboard



Data accessible to you via the OA Switchboard may be confidential, sensitive and/or subject to privacy laws. Please observe the terms in the OA Switchboard General Terms & Conditions, and your Service Agreement or Test Terms of Use, as well as any other relevant agreements with parties you exchange messages with via the OA Switchboard.

Search

MESSAGES DLQ MESSAGES COMPOSE MESSAGE ✓

EXPORT

1 2 3 ... 11 12 13 next

	ID	MESSAGE TYPE	DATE	STATUS	SENDER TYPE	SENT FROM	SENT TO	RECEIVER TYPE	RECEIVED BY	DETAILS
	10553	p1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	consortia	UKB	Journal of Animals 45678 part 3 Story of animals
	10551	p1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	institution	Universiteit Maastricht Test	Journal of Animals 45678 part 3 Story of animals
>	10550	e2	2023/01/11	~	institution	Universiteit Maastricht Test	Test Publisher	publisher	Test Publisher	
	10549	p1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	consortia	UKB	Journal of Animals 45678 Story of

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>	10550	e2	2023/01/11	~	institution	Universiteit Maastricht Test	Test Publisher	publisher	Test Publisher	
	10549	p1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	consortia	UKB	Journal of Animals 45678 Story of animals

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MESSAGES DLQ MESSAGES COMPOSE MESSAGE ✓

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	10551	p1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	institution	Universiteit Maastricht Test	Journal of Animals 45678 part 3 Story of animals
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	10549	p1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	consortia	UKB	Journal of Animals 45678 Story of animals

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MESSAGES DLQ MESSAGES COMPOSE MESSAGE ✓

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>	10550	e2	2023/01/11	~	institution	Universiteit Maastricht Test	Test Publisher	publisher	Test Publisher	
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Dashboard Admin Logout Test Publisher

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	ID	MESSAGE TYPE	DATE	STATUS	SENDER TYPE	SENT FROM	SENT TO	RECEIVER TYPE	RECEIVED BY	DETAILS
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	10549	р1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	consortia	UKB	Journal of Animals 45678 Story of animals

Tutorial

2. How do I read a P1-message in the user interface?

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MESSAGES DLQ MESSAGES COMPOSE MESSAGE ✓

EXPORT

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ID	MESSAGE TYPE	DATE	STATUS	SENDER TYPE	SENT FROM	SENT TO	RECEIVER TYPE	RECEIVED BY	DETAILS
336816	р1	2023/01/12	Response not required	publisher	Royal Society of Chemistry	Dutch Research Council	funder	Consolidated funder account	Physical Chemistry Chemical Physics https://doi.org/10.1039/d2cp05515e Interfacial pH measurements during CO2 reduction on gold usi
336765	р1	2023/01/12	Response not required	publisher	Company of Biologists	Wellcome Trust	funder	Consolidated funder account	Development https://doi.org/10.1242/dev.201058 Hydrozoan sperm-specific SPKK motif- containing histone H2B v
336756	р1	2023/01/12	Response not	publisher	Royal Society of	German Research	funder	Consolidated funder	Journal of Analytical Atomic Spectrometry https://doi.org/10.1039/d2ja00190j Dynamic

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Dashboard Logout Consolidated funder account

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ID	MESSAGE TYPE	DATE	STATUS	SENDER TYPE	SENT FROM	SENT TO	RECEIVER TYPE	RECEIVED BY	DETAILS
336816	p1	2023/01/12	Response not required	publisher	Royal Society of Chemistry	Dutch Research Council	funder	Consolidated funder account	Physical Chemistry Chemical Physics https://doi.org/10.1039/d2cp05515e Interfacial pH measurements during CO2 reduction on gold usi
336765	p1	2023/01/12	Response not required	publisher	Company of Biologists	Wellcome Trust	funder	Consolidated funder account	Development https://doi.org/10.1242/dev.201058 Hydrozoan sperm-specific SPKK motif- containing histone H2B v
336756	p1	2023/01/12	Response not	publisher	Royal Society of	German Research	funder	Consolidated funder	Journal of Analytical Atomic Spectrometry https://doi.org/10.1039/d2ja00190j Dynamic

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336174	p1	2023/01/12	Response not required	publisher	Oxford University Press	Dutch Research Council	funder	Consolidated funder account	Nucleic Acids Research https://doi.org/10.1093/nar/gkac1262 The homeodomain of Oct4 is a dimeric binder of methylated Cp
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335681	p1	2023/01/11	Response not required	publisher	PLOS	Social Sciences and Humanities Research Council / Conseil de	funder	Consolidated funder account	PLOS ONE https://doi.org/10.1371/journal.pone.0279002 Basic emotion recognition of children on the

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firstName: initials: .

ORCID: 0000-

collaboration: listingorder: 1

isCorrespondingAuthor: true

affiliation: Department of Biological Sciences, Smith College, Northampton, Massachusetts, United States of America, Department of Biological Sciences, Quinnipiac University, Hamden, Connecticut, United States of America

X

creditroles:

- 0: conceptualization
- 1: data curation
- 2: formal analysis
- 3: funding acquisition
- 4: investigation
- 5: methodology
- 6: project administration

institutions:

1:

name: Department of Biological Sciences, Smith College, Northampton, Massachusetts, United States of America ror: https://ror.org/0497crr92

X

2:

name: Department of Biological Sciences, Quinnipiac University, Hamden, Connecticut, United States of America ror: https://ror.org/00mpz5a50

currentaddress:

1:

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title: Targeting a highly repetitive genomic sequence for sensitive and specific molecular detection of the filarial parasite Mansonella perstans from human blood and mosquitoes

type: research-article

originaltype: research-article

acknowledgement:

submissionId: PNTD-D-22-00849

doi: https://doi.org/10.1371/journal.pntd.0010615

grants:

1:

id: OPP1154992

2

id: MR/P025285/1

manuscript:

id: PNTD-D-22-00849

dates:

submission: 2022-06-28 acceptance: 2022-12-15 publication: 2022-12-29

preprint:

vor:

publication: pure OA journal

license: CC BY

deposition: open repository, like PMC researchdata: data available on request



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fundref: 100000865

ror: https://ror.org/0456r8d26

2:

name: Global Challenges Research Fund

fundref: 100016270

3:

name: Blakeslee Fund for Genetics Research at Smith College

journal:

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335930	p1	2023/01/11	Response not required	publisher	Oxford University Press	Bill & Melinda Gates Foundation	funder	Consolidated funder account	The World Bank Economic Review https://doi.org/10.1093/wber/lhac031 Time for Clean Energy? Cleaner Fuels and Women's Time in Hom
335915	p1	2023/01/11	Response not required	publisher	Oxford University Press	World Health Organization	funder	Consolidated funder account	International Health https://doi.org/10.1093/inthealth/ihac088 Investigating outbreaks of initially unknown aetiology in co
335865	p1	2023/01/11	Response not required	publisher	PLOS	Bill & Melinda Gates Foundation	funder	Consolidated funder account	PLOS Neglected Tropical Diseases https://doi.org/10.1371/journal.pntd.0010615 Targeting a highly repetitive genomic sequence for sensitive
335684	р1	2023/01/11	Response not required	publisher	PLOS	German Research Foundation	funder	Consolidated funder account	PLOS ONE https://doi.org/10.1371/journal.pone.0279620 The association of chronotype and social jet lag with body c
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Search

MESSAGES DLQ MESSAGES COMPOSE MESSAGE ✓

EXPORT

3 ... 46 47 48 next

ID	MESSAGE TYPE	DATE	STATUS	SENDER TYPE	SENT FROM	SENT TO	RECEIVER TYPE	RECEIVED BY	DETAILS
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336765	р1	2023/01/12	Response not required	publisher	Company of Biologists	Wellcome Trust	funder	Consolidated funder account	Development https://doi.org/10.1242/dev.201058 Hydrozoan sperm-specific SPKK motif- containing histone H2B v
336756	p1	2023/01/12	Response not	publisher	Royal Society of	German Research	funder	Consolidated funder	Journal of Analytical Atomic Spectrometry https://doi.org/10.1039/d2ja00190j Dynamic

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Tutorial

3. How do I read a P1-message in the email alert?

Tutorial

4. How do I export and use the Excel report?

Dashboard Admin Logout Test Publisher

Search

MESSAGES DLQ MESSAGES COMPOSE MESSAGE ✓

EXPORT

1 2 3 ... 11 12 13 next

	ID	MESSAGE TYPE	DATE	STATUS	SENDER TYPE	SENT FROM	SENT TO	RECEIVER TYPE	RECEIVED BY	DETAILS
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>	10550	e2	2023/01/11	~	institution	Universiteit Maastricht Test	Test Publisher	publisher	Test Publisher	
	10549	p1	2023/01/11	Response not required	publisher	Test Publisher	University of Maastricht Test	consortia	UKB	Journal of Animals 45678 Story of

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Save as

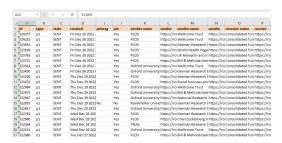
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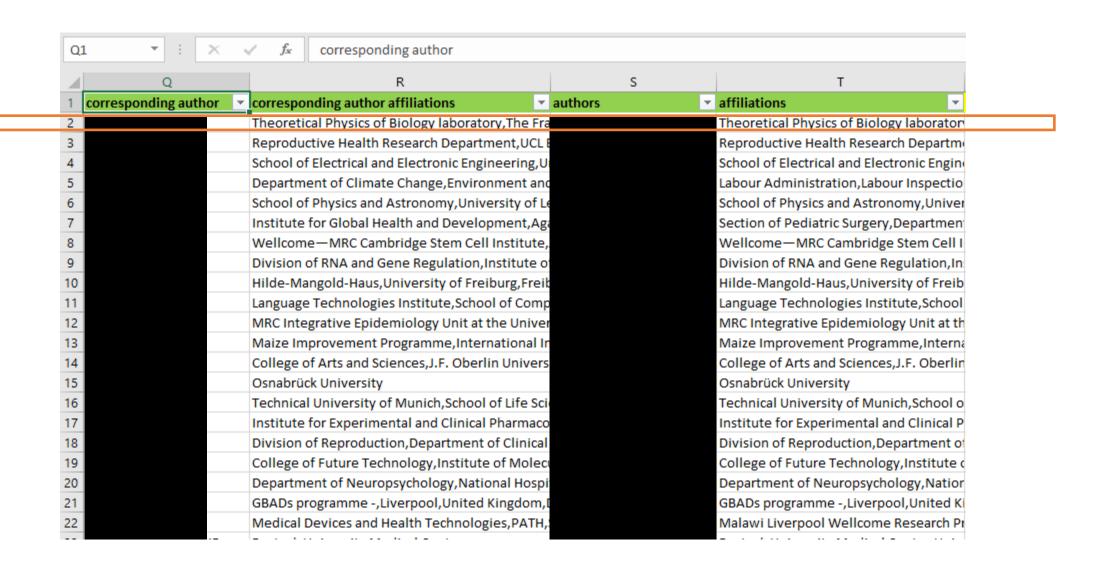


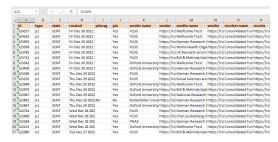
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21	322080	p1	SENT	Tue D	ec 27 2022	2	Yes		PLOS	https:/	//ro	Bill & Melinda Gat	https://ro	Consolidated fu	n https://ro



Section 1:

What's on the envelope? 'Metadata about the metadata'. Who is the sender, who is the recipient, why do I get this message?







Section 2:

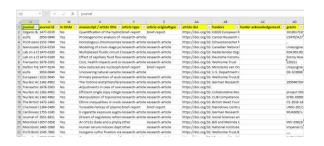
Corresponding author(s) and affiliation(s). All author(s) and affiliation(s).

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2	Organic &	1477-0539	No	Quantification of the hydrid	brief-report	brief-report	https://doi.org/10	. H2020 European F	₹	101001752
3	eLife	2050-084X	Yes	Proteogenomic analysis of	research-article		https://doi.org/10	. Cancer Research		C5470/A27
4	PLOS Gene	1553-7404	Yes	Homologous chromosomes	research-article	research-article	https://doi.org/10	. Schweizerischer I		,
5	Nanoscale	2516-0230	Yes	Modeling of a two-stage po	research-article	research-article	https://doi.org/10	. Canadian Networ	1	Unassigne
6	Lab on a Cl	1473-0189	No	Multiplexed fluidic circuit b	research-article	research-article	https://doi.org/10	. Nederlandse Orga		024.003.00
7	Lab on a Cl	1473-0189	No	Effect of capillary fluid flow	research-article	research-article	https://doi.org/10	. Deutsche Forschu	ı	Emmy No
8	Transactio	1878-3503	No	Cost, health impacts and co	research-article	research-article	https://doi.org/10	. Wellcome Trust		220211
9	Dalton Tra	1477-9234	No	How reduced are nucleophi	brief-report	brief-report	https://doi.org/10	. Ministerie van Or	1	Unassigne
10	eLife	2050-084X	Yes	Uncovering natural variatio	research-article		https://doi.org/10	. U.S. Department	d	DE-SC0008
11	European I	1522-9645	No	Primary prevention of acute	research-article	research-article	https://doi.org/10	. Wellcome Trust, B	3	
12	Nucleic Ac	1362-4962	Yes	The histone acetyltransfera	research-article	research-article	https://doi.org/10	. German Research		109546710
13	Transactio	1878-3503	No	Adjustments in case of over	research-article	research-article	https://doi.org/10			
14	Nucleic Ac	1362-4962	Yes	Efficient single copy integra	research-article	research-article	https://doi.org/10	. Collaborative Res		project SO
15	Nucleic Ac	1362-4962	Yes	Manipulation of topoisome	research-article	research-article	https://doi.org/10	. CLIB Competence		EFRE-0300
16	The British	1472-1465	No	Ethnic inequalities in involu	research-article	research-article	https://doi.org/10	. British Heart Four	1	CS-2018-18
17	Chemical (1364-548X	No	Tuneable helices of plasmo	brief-report	brief-report	https://doi.org/10	. Narodowe Centru	ı	UMO-2017
18	Cardiovaso	1755-3245	No	E-cigarette exposure augme	research-article	research-article	https://doi.org/10	. German Research		MU4309/1
19	Journal of	2051-8811	No	Drivers of regulatory reforn	research-article	research-article	https://doi.org/10	. Social Sciences ar	1	
20	Microbial (2057-5858	Yes	An ST131 clade and a phylog	other	research-article	https://doi.org/10	. Bill and Melinda		INV-03623
21	Microbiolo	1465-2080	No	Human serum induces dapt	other	research-article	-	. National Institute		Imperial C
22	PLOS Biolo	1545-7885	Yes	Inorganic sulfur fixation via	research-article	research-article		. Wellcome Trust,B		,,,,

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2	d2ob02041f	d2ob02041f	2022-11-07	2022-11-25	2022-12-06		hybrid journal	CC BY-NC	open repository, li	k data available on reque
3	75227	75227	2021-11-03	2022-08-15	2022-09-21	https://doi.org	pure OA journa	CC BY	open repository, li	k
4	PGENETICS-D-22-	PGENETICS-D-22-	2022-10-12	2022-11-28	2022-12-08		pure OA journa	CC BY	open repository, li	k data available on reque
5	d2na00562j	d2na00562j	2022-08-22	2022-11-15	2022-11-22		pure OA journa	CC BY-NC	open repository, li	k data available on reque
6	d2lc00686c	d2lc00686c	2022-07-23	2022-10-21	2022-12-09		hybrid journal	CC BY	open repository, li	k data available on reque
7	d2lc00322h	d2lc00322h	2022-04-07	2022-11-04	2022-11-30		hybrid journal	CC BY	open repository, li	k data available on reque
8	trac115	trac115	2022-01-18	2022-11-22	2022-12-20		hybrid journal	CC BY	open repository, li	kother
9	d2dt01694j	d2dt01694j	2022-05-31	2022-07-08	2022-07-25		hybrid journal	CC BY	open repository, li	k data available on reque
10	76968	76968	2022-01-11	2022-08-28	2022-09-01	https://doi.org	pure OA journa	CC BY	open repository, li	k
11	ehac737	ehac737	2022-03-13	2022-11-29	2022-12-20		hybrid journal	CC BY	open repository, li	kother
12	gkac1188	gkac1188	2022-06-23	2022-11-29	2022-12-20		pure OA journa	CC BY-NC	open repository, li	kother
13	trac118	trac118	2022-06-10	2022-11-30	2022-12-19		hybrid journal	non-CC	open repository, li	kother
14	gkac1150	gkac1150	2021-10-27	2022-12-12	2022-12-19		pure OA journa	CC BY-NC	open repository, li	kother
15	gkac1132	gkac1132	2021-09-10	2022-11-10	2022-12-19		pure OA journa	CC BY	open repository, li	kother
16	BJPsych-22-0453	BJPsych-22-0453	2022-06-13	2022-08-05	2023-01-01		hybrid journal	CC BY	open repository, li	kother
17	d2cc00560c	d2cc00560c	2022-02-16	2022-04-29	2022-05-05		hybrid journal	CC BY	open repository, li	k data available on reque
18	cvac173	cvac173	2022-01-27	2022-10-19	2022-11-22		hybrid journal	non-CC	open repository, li	kother
19	000863	000863	2022-01-21	2022-06-15	2022-12-16		other	CC BY	open repository, li	k data available on reque
20	001282	001282	2022-10-14	2022-11-24	2022-12-16		other	CC BY	open repository, li	k data available on reque
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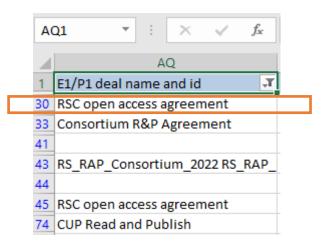
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6	323783	p1	SENT	Fri Dec 30 2022 :		Yes	PLOS	https://ro	UK Research and I	https://re	Consolidated fur	https://r
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	322847	p1	SENT	Thu Dec 29 2022		Yes	Oxford University	https://ro	German Research	https://re	Consolidated fur	https://r
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7	Das JKD	Institute for Global Health and Develop	ment, Agr Qazi SHQ, Meerza S	SAM, Gr Section of Pediatric Surgery, Departmen
8	Mohorianu IIM	Wellcome MRC Cambridge Stem Cell II	nstitute, Moutsopoulos IM,	William: Wellcome MRC Cambridge Stem Cell
9	Inada Ti	Division of RNA and Gene Regulation, in	stitute of Tomomatsu ST, Wa	tanabe / Division of RNA and Gene Regulation, Is
10	Classen AC	Hilde-Mangold-Haus, University of Freib	urg.Freit Crucianelli CC,Jaiss	wal JJ, Vi Hilde-Mangold-Haus, University of Freil
11	Liu EL	Language Technologies Institute, School	of Comp Liu EL, Xu YX	Language Technologies Institute, Schoo
12	Richardson TGR	MRC Integrative Epidemiology Unit at th	e Univer Korologou-Linden	RK,Leyd MRC Integrative Epidemiology Unit at t
13	Badu-Apraku BB	Maize Improvement Programme, Interne	etional in Okuniola GO,Badu-	-Apraku Maize Improvement Programme, Intern
14	Miyawaki RM		Univers Miyawaki RM, Haya	ishi MH, College of Arts and Sciences, J.F. Oberli
15	Fröhlich	Osnabrück University	Limar ,Körner ,Mar	tinez-Mi Osnabrück University
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17	Schmidt GS	Institute for Experimental and Clinical P	harmaco Schoellkopf JS,Mur	eller TM Institute for Experimental and Clinical
18	Leclercq AL	Division of Reproduction, Department of	Clinical Leclercq AL,Ranefa	III PR,Sjr Division of Reproduction, Department of
19	Chen ZC	College of Future Technology, Institute of	of Moleci Liu TL, Stephan TS, C	Chen PC, College of Future Technology, Institute
20	Cipolotti LC	Department of Neuropsychology, Nation	ial Hospi Cipolotti LC,Ruffle	JKR,Mo Department of Neuropsychology, Natio
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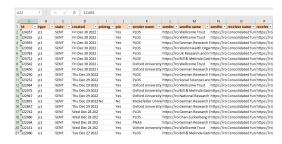


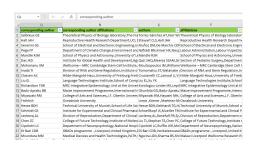
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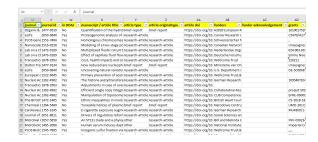
Article level metadata, with applicable journal metadata. Valid at publication (VoR) stage.



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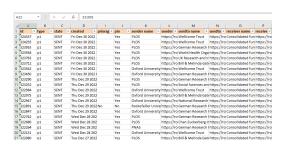


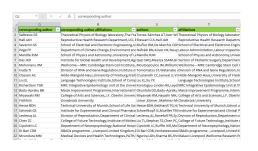


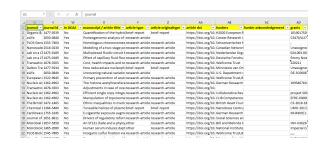
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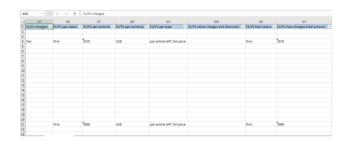
Financial settlement data at article level (applicable deal, APC and other charges and discounts).

These handy Excel reports are for basic analysis only









A word of caution:

The richness and granularity of the underlying JSON gets lost in the Excel!!!

Tutorial

5. How do I use the JSON export?

4. Future developments & Further training

for research institutions, libraries and consortia

who want to:

connect with their research and simplify their workflows

The OA Switchboard can be used by institutions to enhance their workflows, enable fulfilment of OA publication-level arrangements, make OA publishing highly visible, and more. Participation in the OA Switchboard will lead to enhancements in OA publication metadata and integration with the increasingly complex open access research and publishing ecosystem.

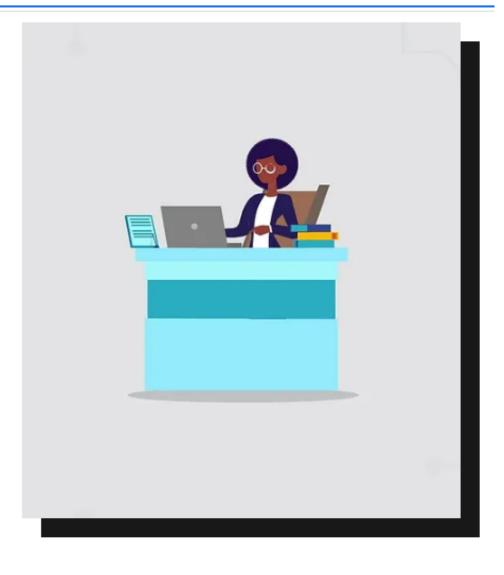
As an intermediary, the OA Switchboard simplifies the sharing of information between publishers, institutions and funders, thereby reducing the transactional cost for stakeholders, and it provides a safe space for publication metadata.

We currently support two use cases:

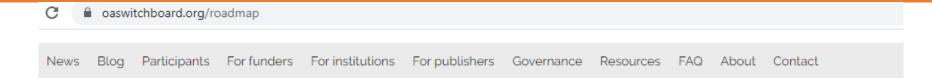
- Reporting Made Easy
- 2. Matching Publication Costs with Publication Funds

Get inspired by participating institutions' Cases, Testimonials and Interviews.





Development roadmap



Development roadmap

2023 development roadmap:





- Iteration 2023/#2 Message Structure Update
- Iteration 2023/#3 Usability Improvements
- Iteration 2023/#4 P1 Funder Messages

???:

- OA Books
- Usage stats
- C1-C2 PoC

Delivered in 2022:

 Iteration #1 (theme 'Quality Assurance'): Automated test procedures (development of unit tests and integration test scripts). Manual test procedures for UI. Monitoring script and notifications. Updated



OA Switchboard Webinar: Data-Driven Approaches to Design your OA Strategy



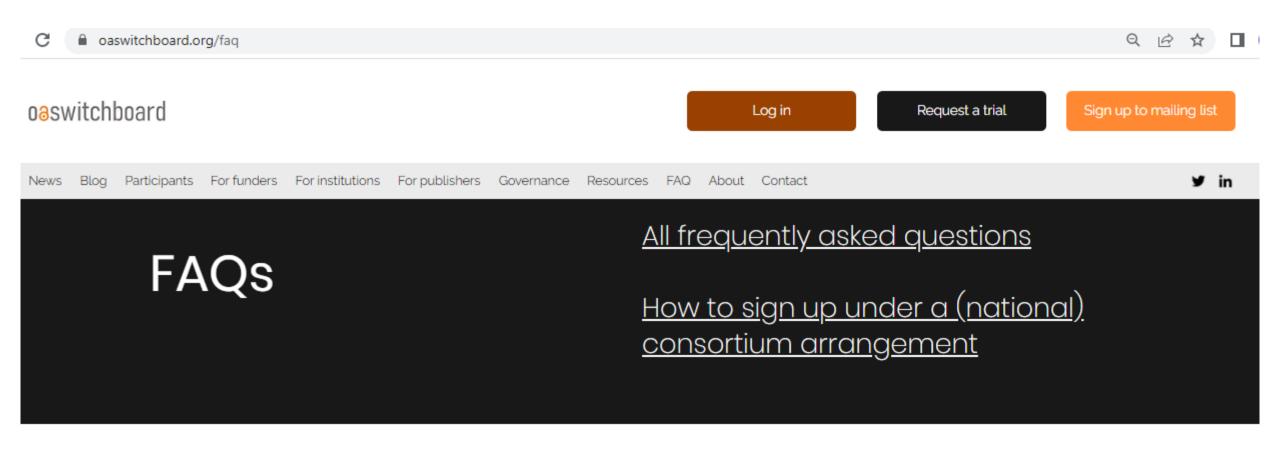
Topic Data-Driven Approaches to Design your OA Strategy

Description This practical evidence-based webinar is suitable for those within research institutions, funders and academic publishers.

Register today for this webinar to learn and contribute to the discussion.

Join us today! Registration is still open: www.oaswitchboard.org/news

5. How do I sign up and get an account?



17. How do I sign up under a (national) consortium arrangement?

For almost all <u>(national) consortium arrangements</u>, the member-level <u>service fee</u> is covered by the consortium, but members do need to sign their own <u>Service Agreement</u>. Sometimes, the consortium and OA Switchboard have agreed a consortium-specific agreement template that has been reviewed and signed-off by the consortium.

Please contact support@oaswitchboard.org to get your consortium member agreement prepared for signing. Your account will be activated within a matter of days.

Thank you!

oaswitchboard