Ex Libris Esploro

Your path to greater research impact

Focus On Open Science

uc3m | Universidad Carlos III de Madrid

Ghislain Onestas

Pre-Sales Solutions Expert EMEA

ExLibris a ProQuest Company

The Research Workflow

Strategy & Integration Among Workflow Providers, ROGER C. SCHONFELD, The Scholarly Kitchen

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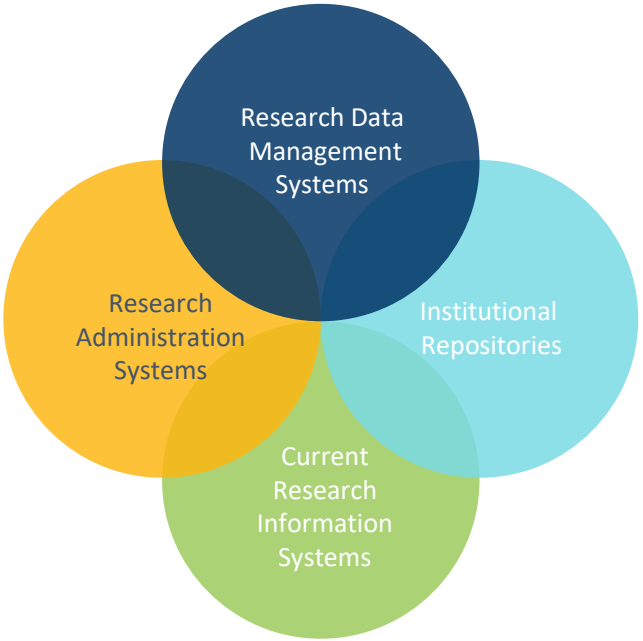
The Research Solutions Landscape: Current Challenges

- Disjoint point solutions with lots of duplicative and manual work
- STEM focused
- Reliance on researcher's deposits & manual work
- Lack of integration with library workflows
- Incomplete researcher's profiles & analytics
- Limited built-in collaborations and open APIs



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Navigating the Complexity of Research Processes

Researchers

Publish, publish, publish

- Too many systems
- Overhead of working with IRs
- Hard to maintain public profile
- Competition for funding

Librarians

Support research processes

- Manual workflows
- Multiple systems & data models
- Discoverability of research assets
- Far from the research process

Research Office

Increase effectiveness of research activities

- Risk of non-compliance
- Compliance of OA publications
- Plan S
- Research Assessment Systems
- Visibility to publication metrics
- Interdisciplinary collaborations

Impact on: Visibility, Efficiency, Compliance

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Paving the way to greater impact of academic research by maximizing visibility, efficiency, and compliance of research activities, leveraging library expertise and technology

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Ex Libris Esploro

Increased impact of research activities

Data exposure via discovery & institutional portals

Automated update of researcher profiles

Research metrics and benchmarks

A next-gen research repository

All research assets in one place, connected

Intelligent capture

Enrichment of metadata

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Esploro at a Glance

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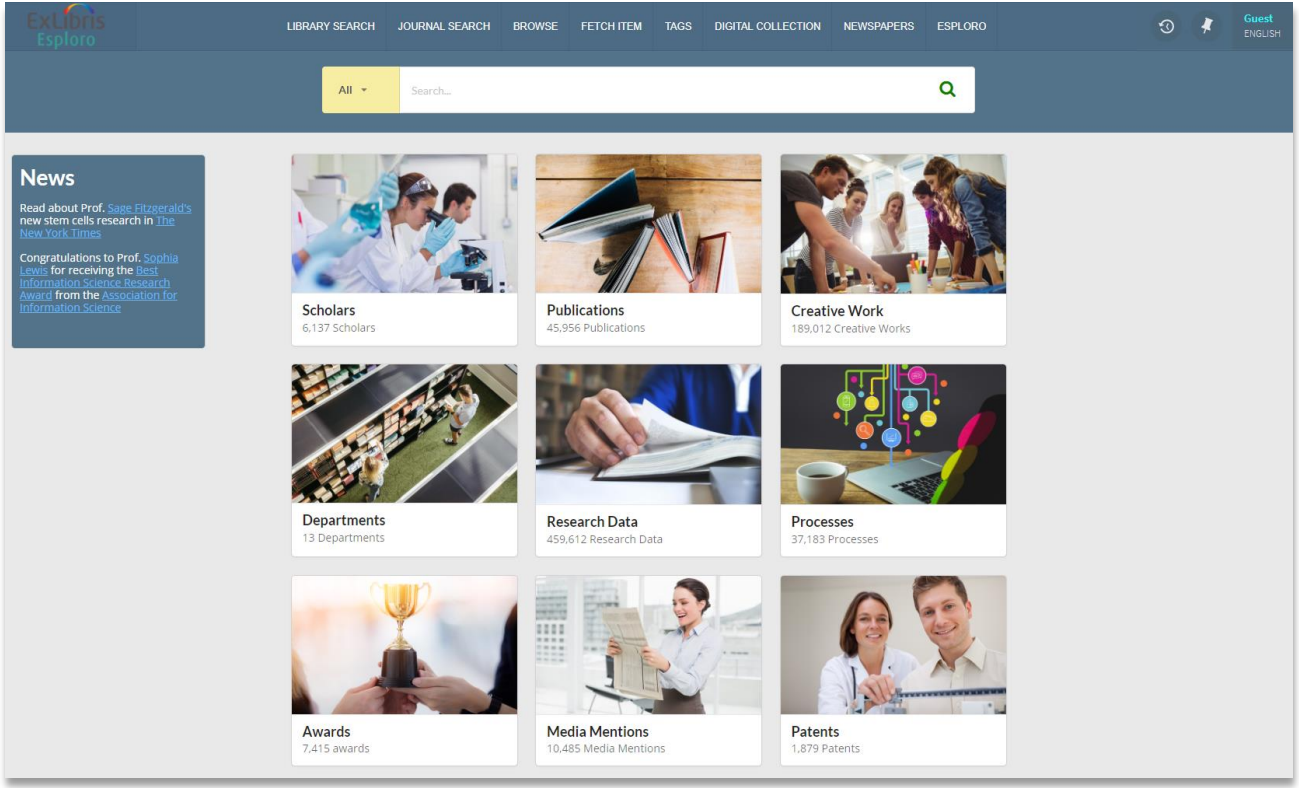
Showcasing Institutional Research



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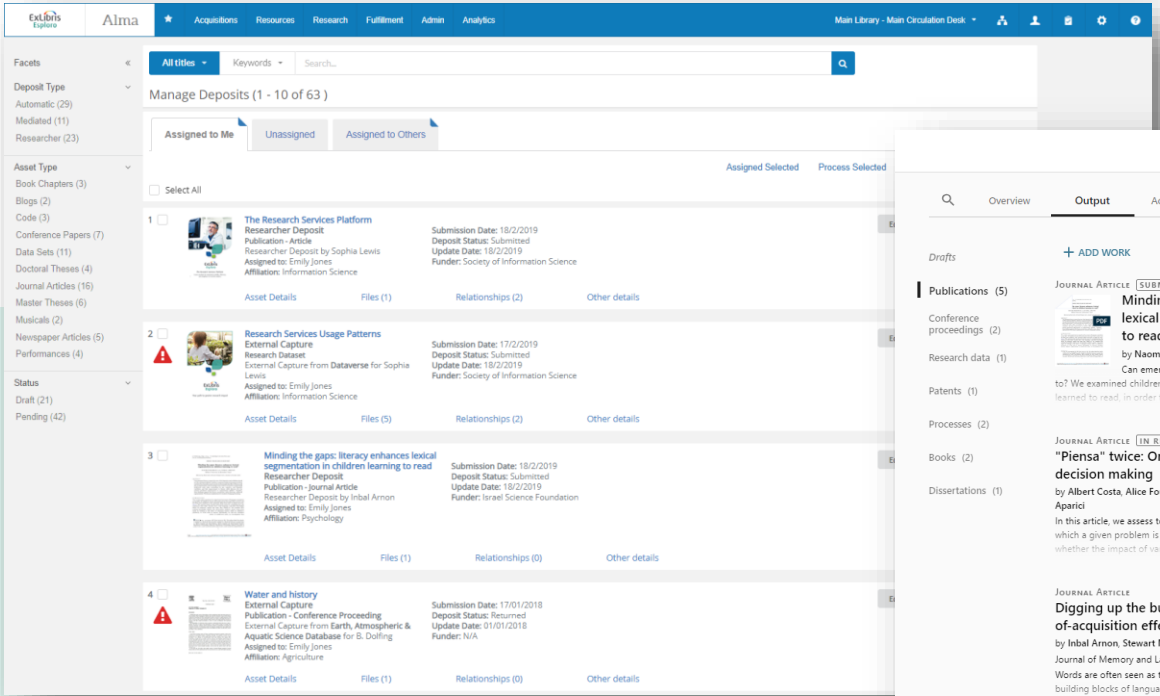
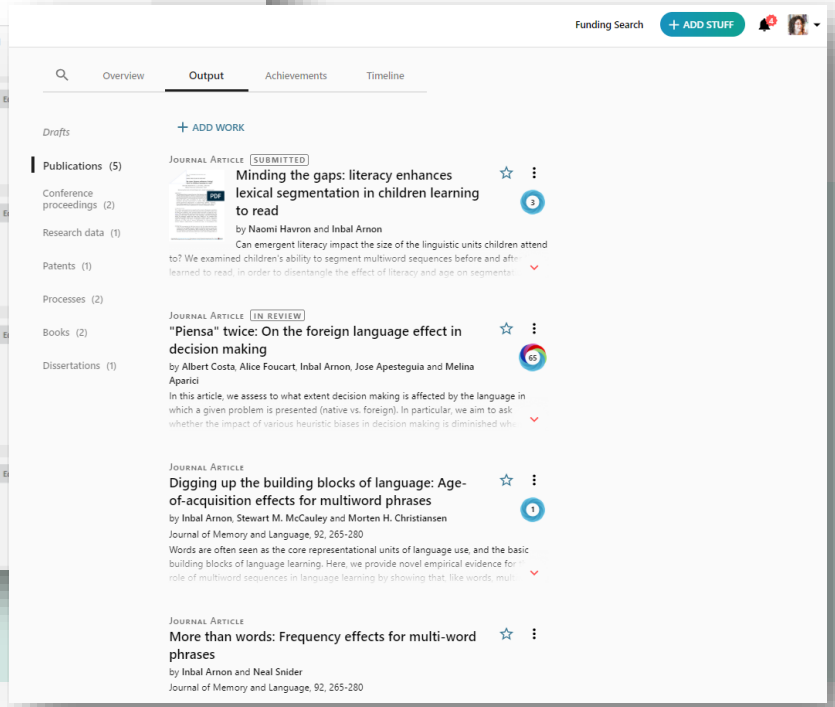
Managing All Research Output & Data in One Place



Library back-office

Researcher Public Profile



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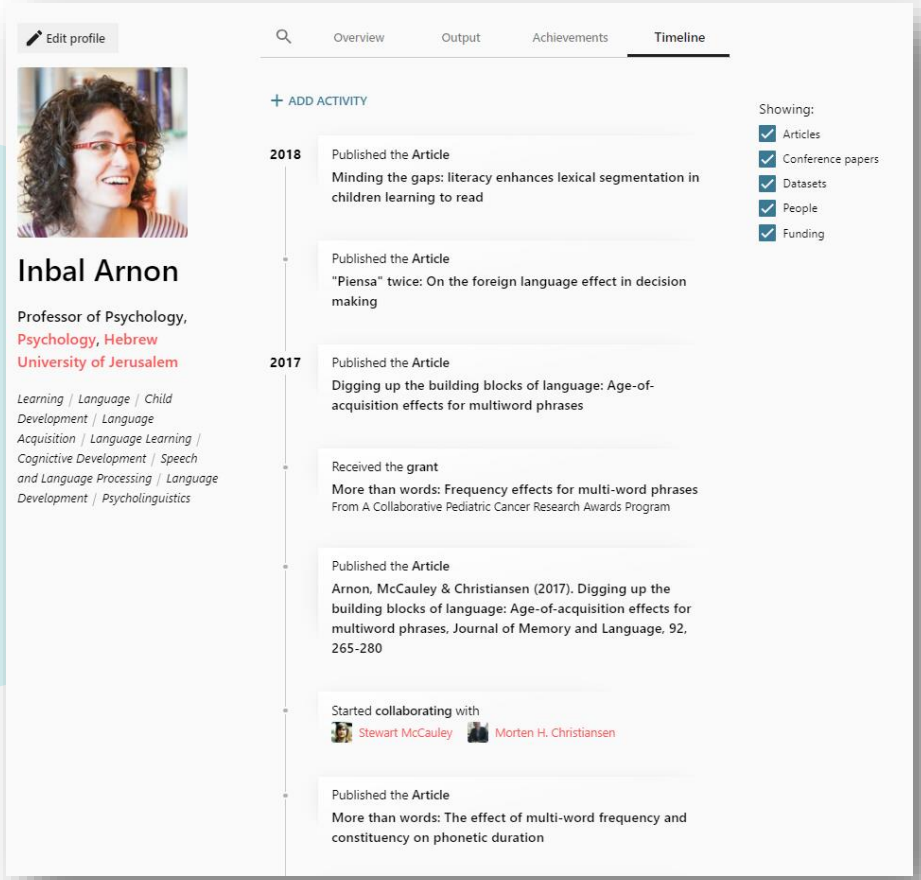
Intelligent Capture from External Sources



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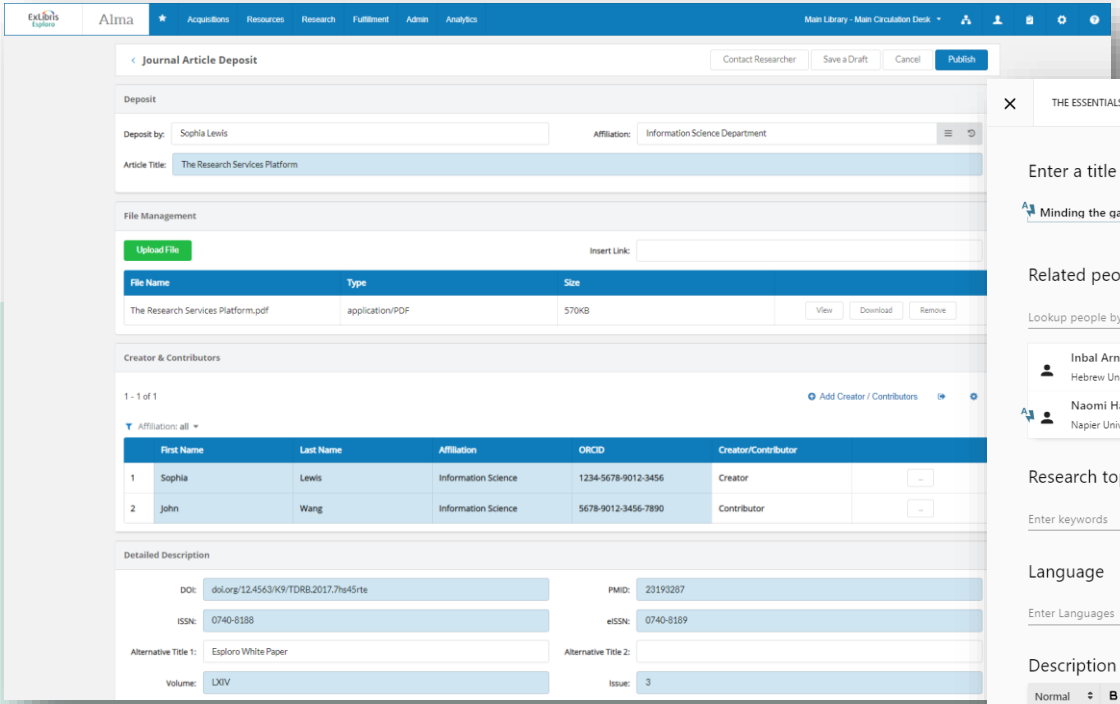
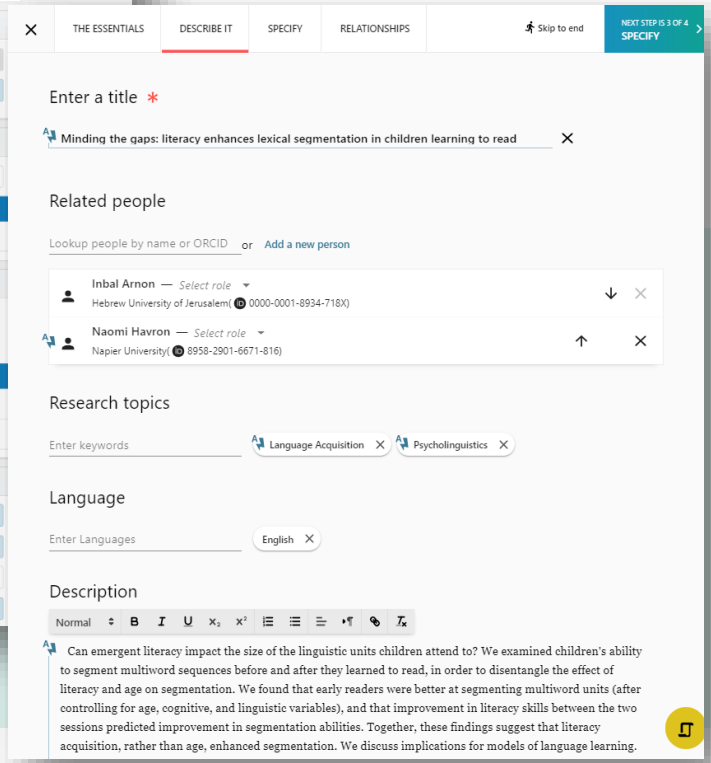
Easy Deposits – by Library or Researcher



Library mediated deposit

Researcher deposit



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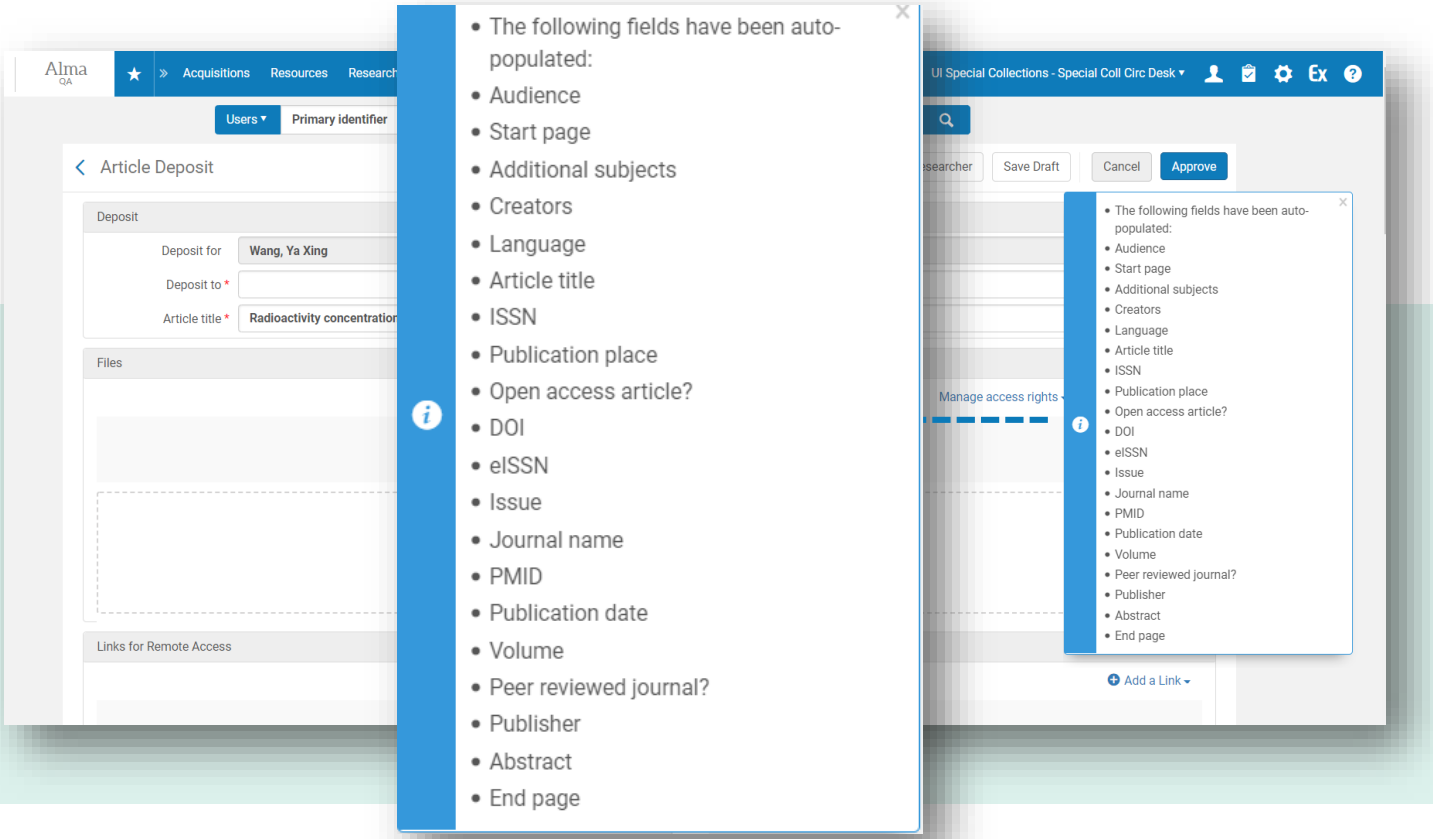
Automated Population of Metadata & Easy Enrichment



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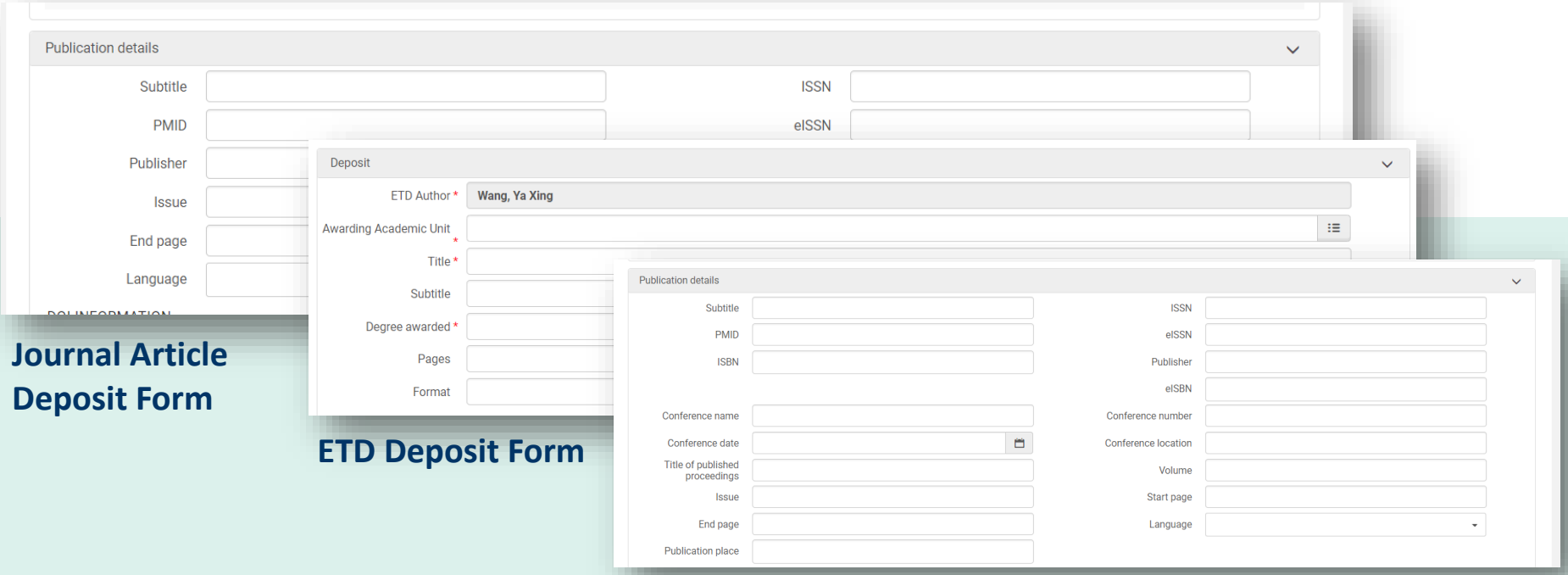
Flexible Data Models – Tailored per Asset Type



Journal Article Deposit Form

ETD Deposit Form

Conference Proceedings Deposit Form

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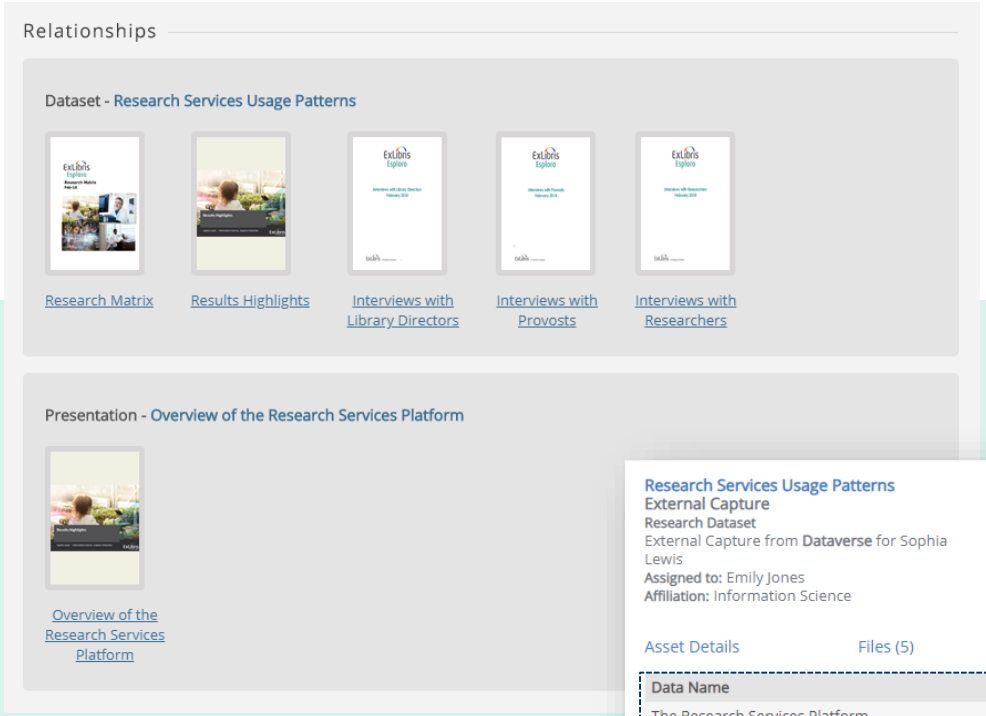
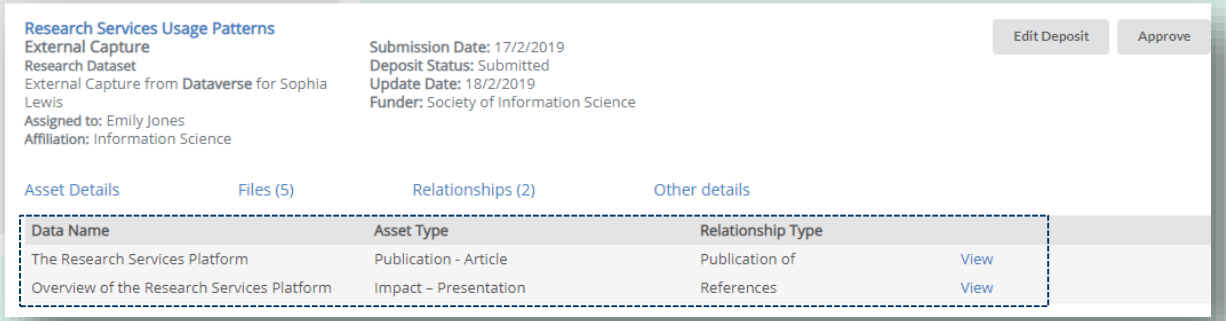
Holistic, Connected View of Research Output and Data



Public Research Portal

Library Deposits Management



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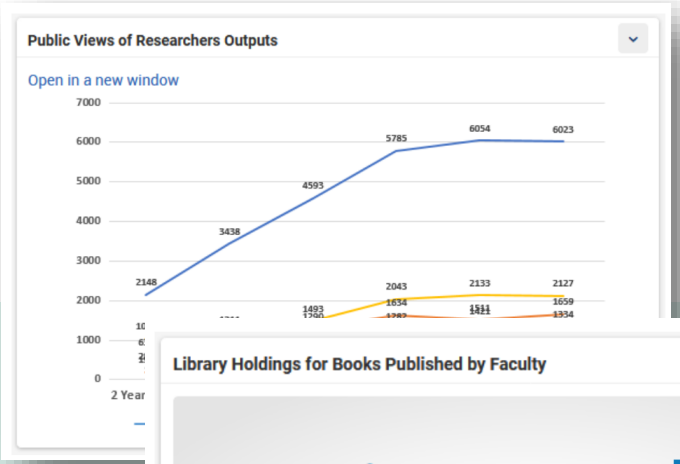
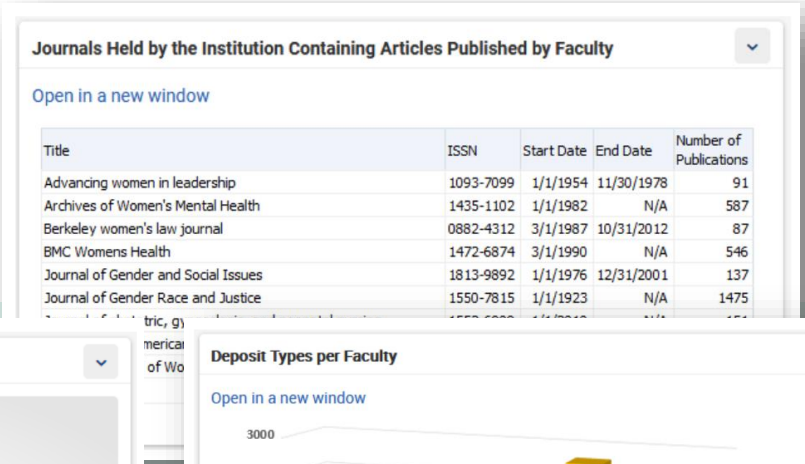
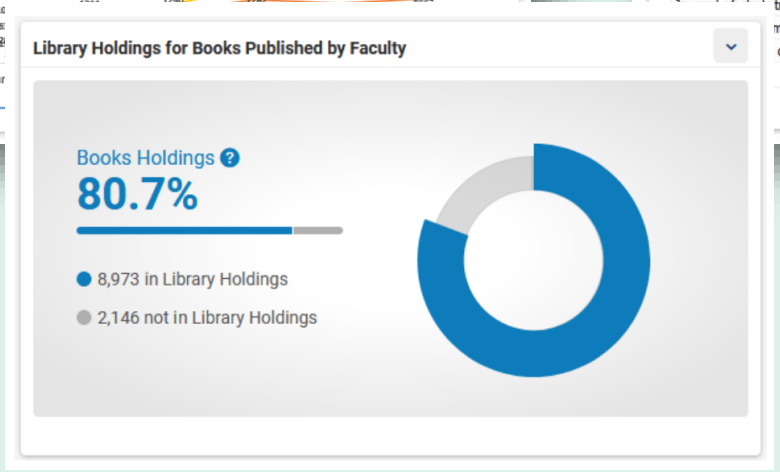
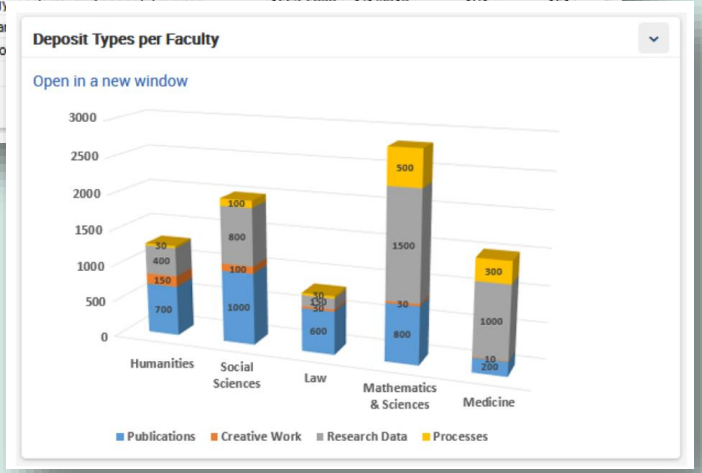
Comprehensive Analytics









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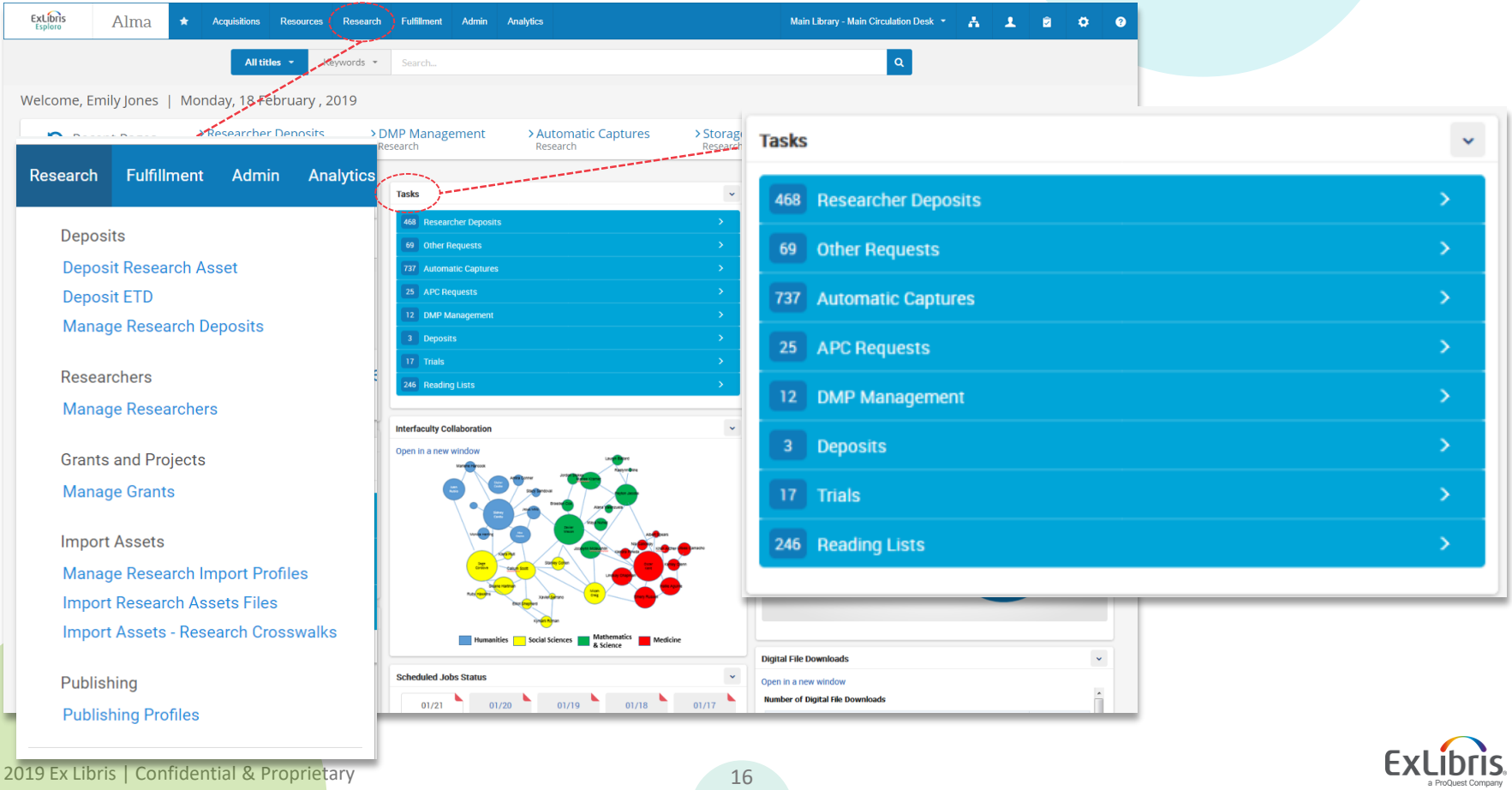
Integrated Alma Workflows



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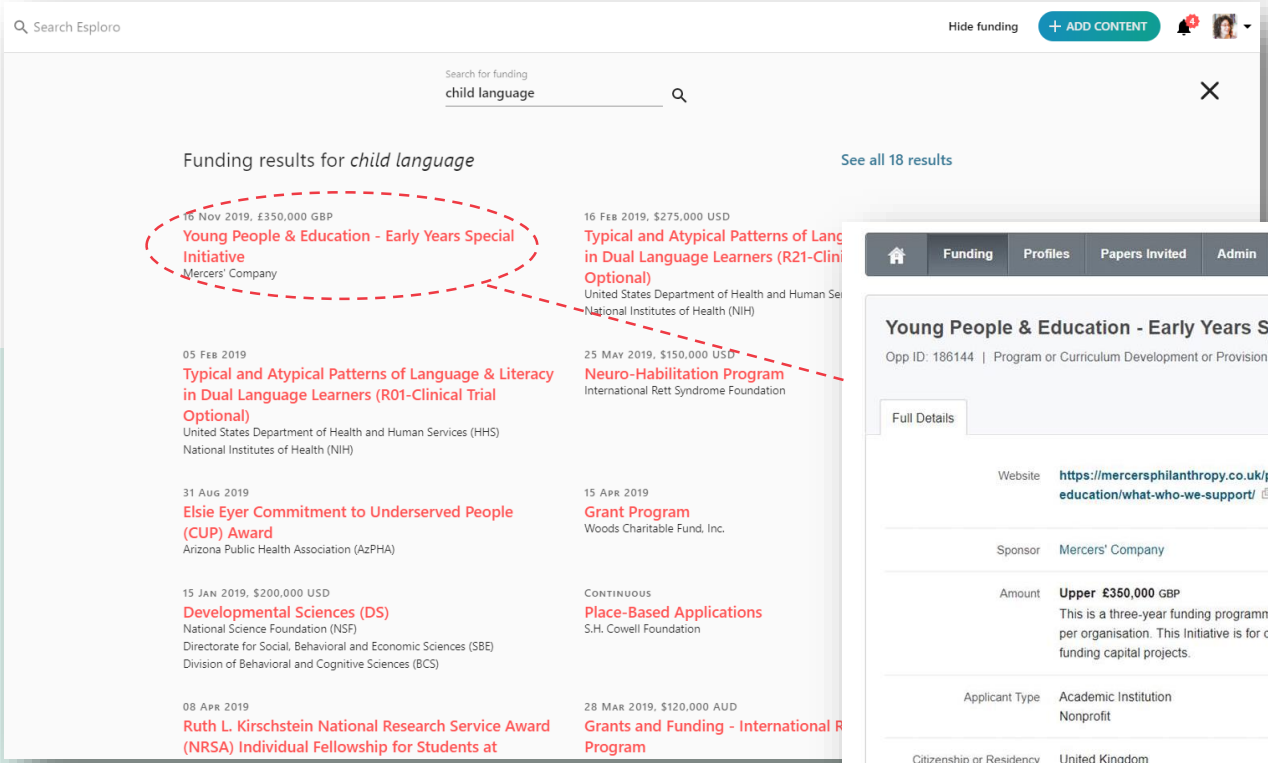
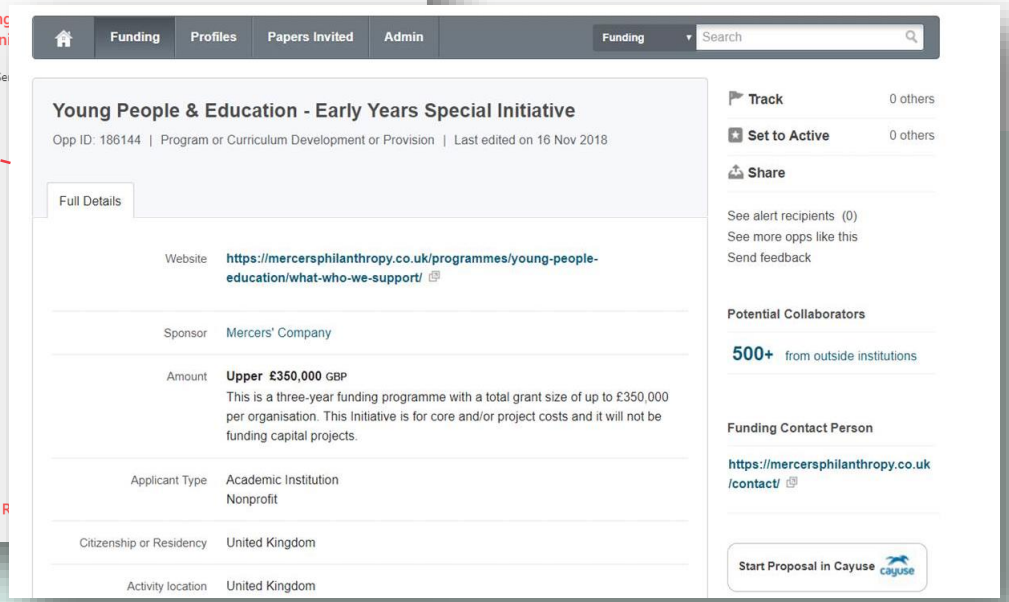
Integrated Pivot/Research Professional Search for Funding Opportunities



Funding Opportunities view in Esploro

Full details in Pivot



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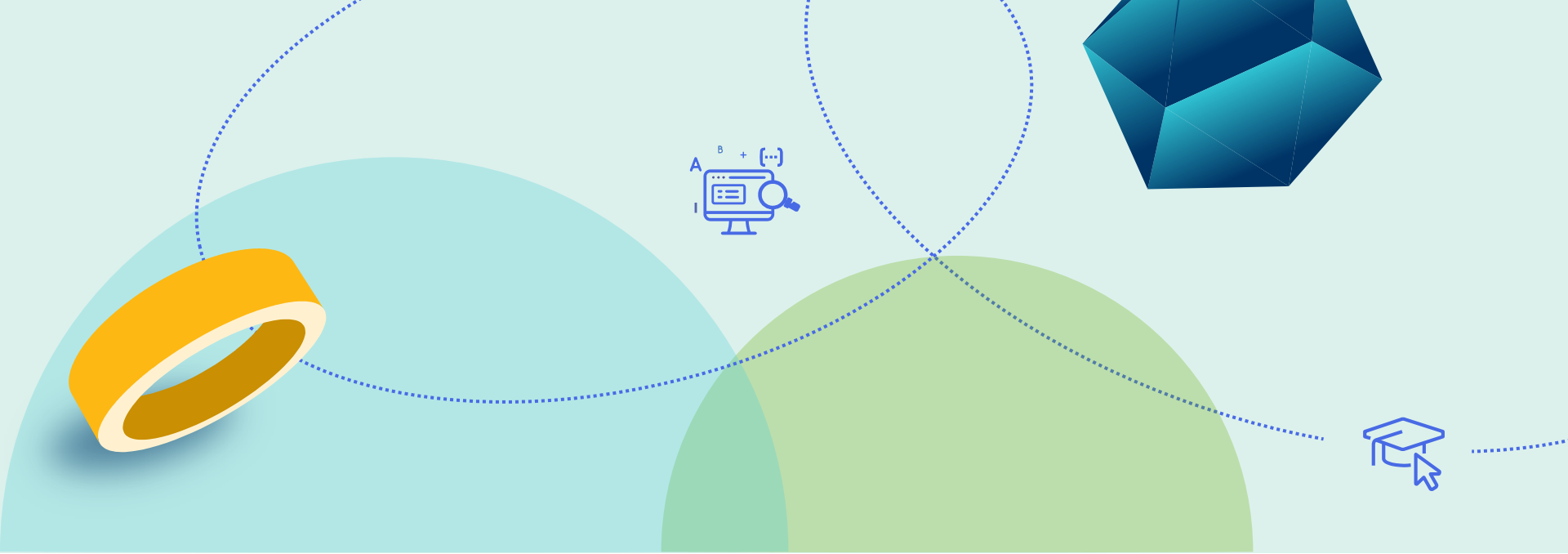

Esploro – your path to greater research impact

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Creating the Next-Generation Research Repository

A wide range of research assets

Publications	Creative Works	Research Data	Activities
Articles, pre-prints, thesis, dissertations, etc.	Performing art, media installations, drawings, compositions, etc.	Datasets, raw data, computations, Software, ELNs, etc.	Achievements, Awards, Social & Media mention, etc.

Systematic and sustainable data management

- Automated curation
- Metadata enrichment
- Discoverability & accessibility
- Linking research assets and metadata
- Data safeguarding

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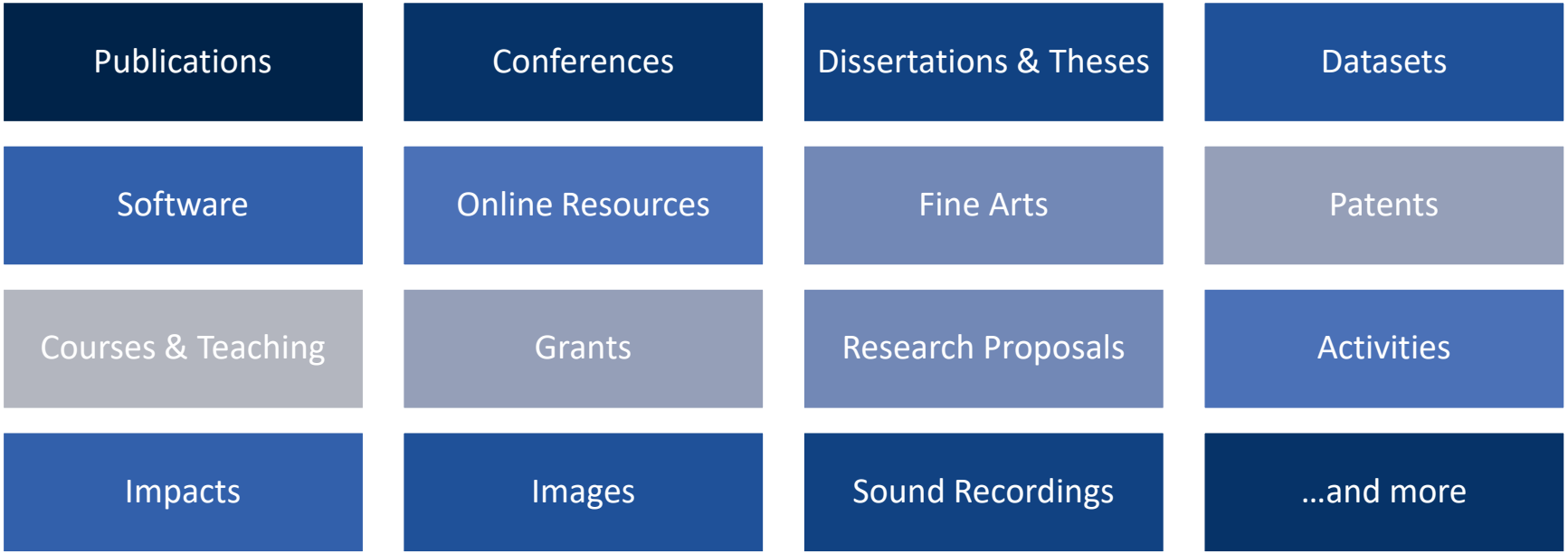
Flexible Data Models



Supporting all disciplines and research types

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Getting the Data – a Changed Paradigm

More streamlined author archive/deposit interwoven into work process

- Simple, embedded and integrated
- Automated metadata (when possible) and notifications
- Review/edit vs. fill-in forms

More comprehensive automatic capture from external sources

- Published content (e.g. indexed by library discovery)
- Disciplinary and specialized repositories
- National repositories

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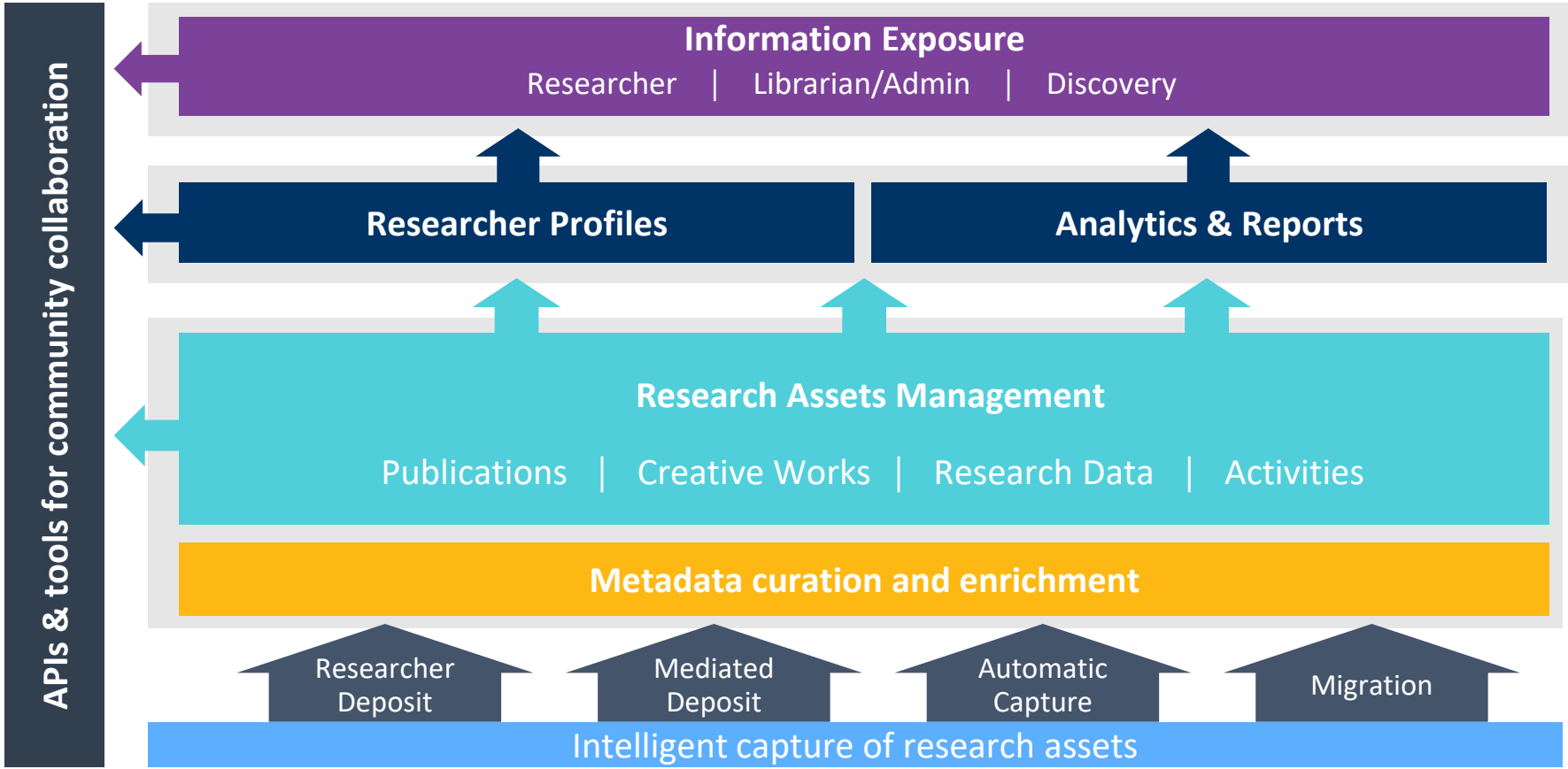
The Framework: Research Services Platform



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Research Repository: Moving beyond the Traditional IR

Capturing a comprehensive record of research assets in a unified, metadata rich, cloud-based repository

- Unified & comprehensive
- Quality metadata
- Workflow-based
- Mediate & unmediated
- Integrated analytics
- Broad dissemination

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Guiding Principles for Esploro

We will not change researchers' habits

- Will be seamless to the researchers' flow
- The service will still work even if researchers don't fully engage with the system

We will not create more work for librarians

- Eliminate redundant and manual processes
- Rule-based workflows

We will not be yet another point solution

- Open, interoperable and integrated with other systems
- Intuitive out-of-the-box, yet highly configurable per institution

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Efficient Management of Article Processing Charges (APC)

- APC workflows – create requests directly in the system
- Interaction with SHERPA/RoMEO to check on journal status
- Track APC status – pre and post compliance checks
- Search for APCs
- Analytics
  - Compare APC costs with subscription costs from Alma
  - APC costs by publisher, journal, department and other parameters
  - APC reports

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Intelligent Migration Process

- Migrating data from existing repositories is a complex and delicate task
- Automatic migration to Esploro includes:
  - Out of the box support for multiple systems
  - Automated author matching and deduplication processes based on advanced algorithms
  - Customizable crosswalk for metadata
  - Process tailored to the institutional needs and systems
  - Flexible integration options – OAI-PMH, CSV, APIs
  - Collaborated and guided process managed by Ex Libris Professional Services team

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Metrics and Analytics

University Policies

Author Metrics

Citation Metrics

Esploro Usage Data

Compliance Regulations

Media Reports

Journal Metrics

Altmetrics

Esploro Analytics Manager

Author Metrics

Usage Data

Media Reports

Altmetrics

Citation Metrics

Repository Statistics

Journal Metrics

Connector

Esploro Portals

(researcher / library / research office)

APIs

3rd Party Reporting Systems

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Core Part of the Ex Libris Research Suite

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Comprehensive Research Information Management

Automating research workflows

Matching scholars with funding opportunities

Increasing visibility and recognition

Connecting the dots across the research lifecycle

Esploro Pivot Research Professional RefWorks Summon Primo

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Connected to the ecosystem via open APIs

External repositories

Research Administration

Public Profiles

HR systems

Current Research Information Systems

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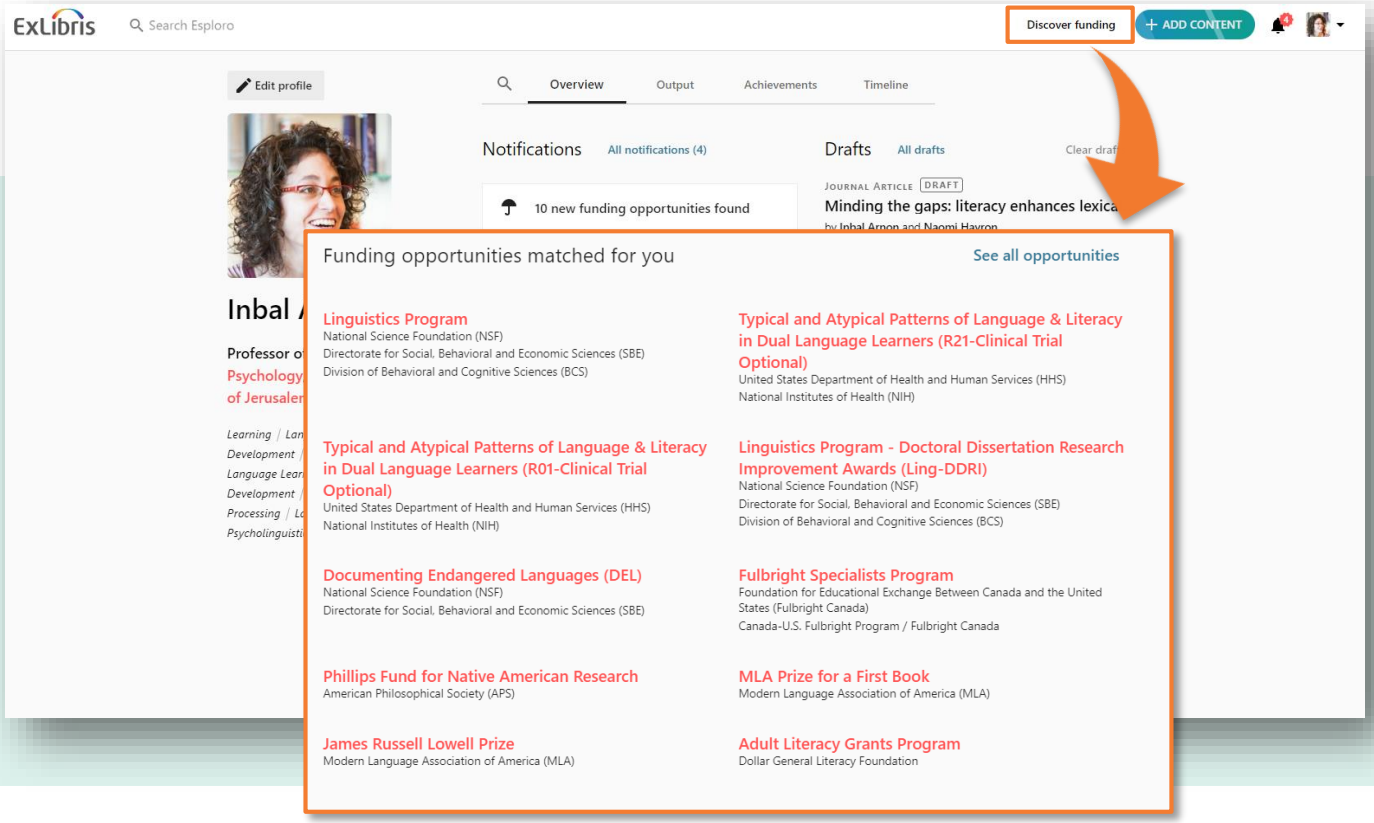
Integrated Funding Matches for Esploro Researchers



Direct integration of Pivot/Research Professional funding recommendations within Esploro

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Built on the Ex Libris Higher-Ed Cloud Platform

Alma | Primo | Summon | Esploro

Leganto | RefWorks | campusM | Pivot

App Services

UX & Mobile Framework | Workflow Engines | Collaboration Services | Analytics & Dashboards | Shared Data & Content

Infrastructure Services

Agile Releases | Multi-Tenancy | Open APIs & Integrations | Metadata & Data Schemas | Security & Authentication

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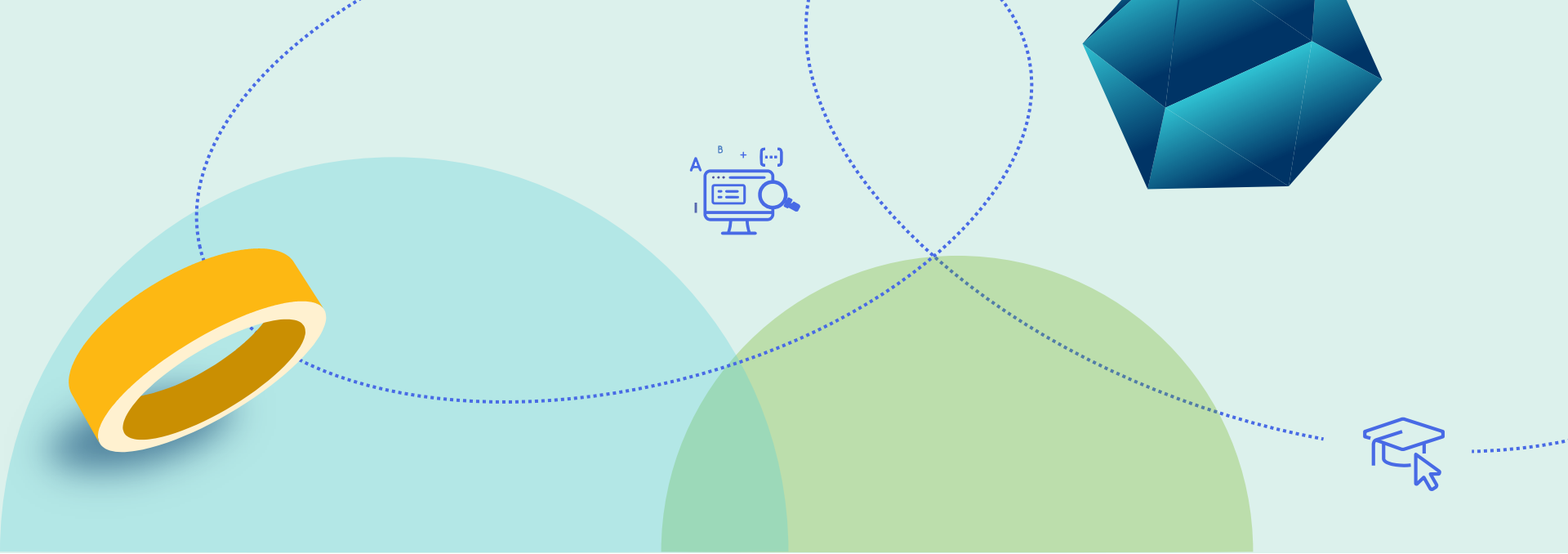

Supporting Open Research

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Open Data

Research assets

accessible from any platform (e.g. Google/Google Scholar, discovery systems)

Scholarly profiles

can be accessed and displayed by other institutional profile systems

Support for open access publication models

efficient management and analysis of Article Processing Charges (APC)

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Open Research Ecosystem

Open APIs

- ✓ Actions
- ✓ Workflows
- ✓ Data

ExLibris Esploro

Interoperability with academic systems

- ✓ Discovery
- ✓ Scholarly profiles
- ✓ Research management
- ✓ Data repositories
- ✓ Open publishing systems

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Open Scholarly Metrics

Metrics and reports available to 3rd party analysis and reporting systems

Esploro Analytics Manager

- Author Metrics
- Usage Data
- Media Reports
- Altmetrics
- Citation Metrics
- Repository Statistics
- Journal Metrics

Connector

Esploro Portals
(researcher / library / research office)

APIs
3rd Party Reporting Systems

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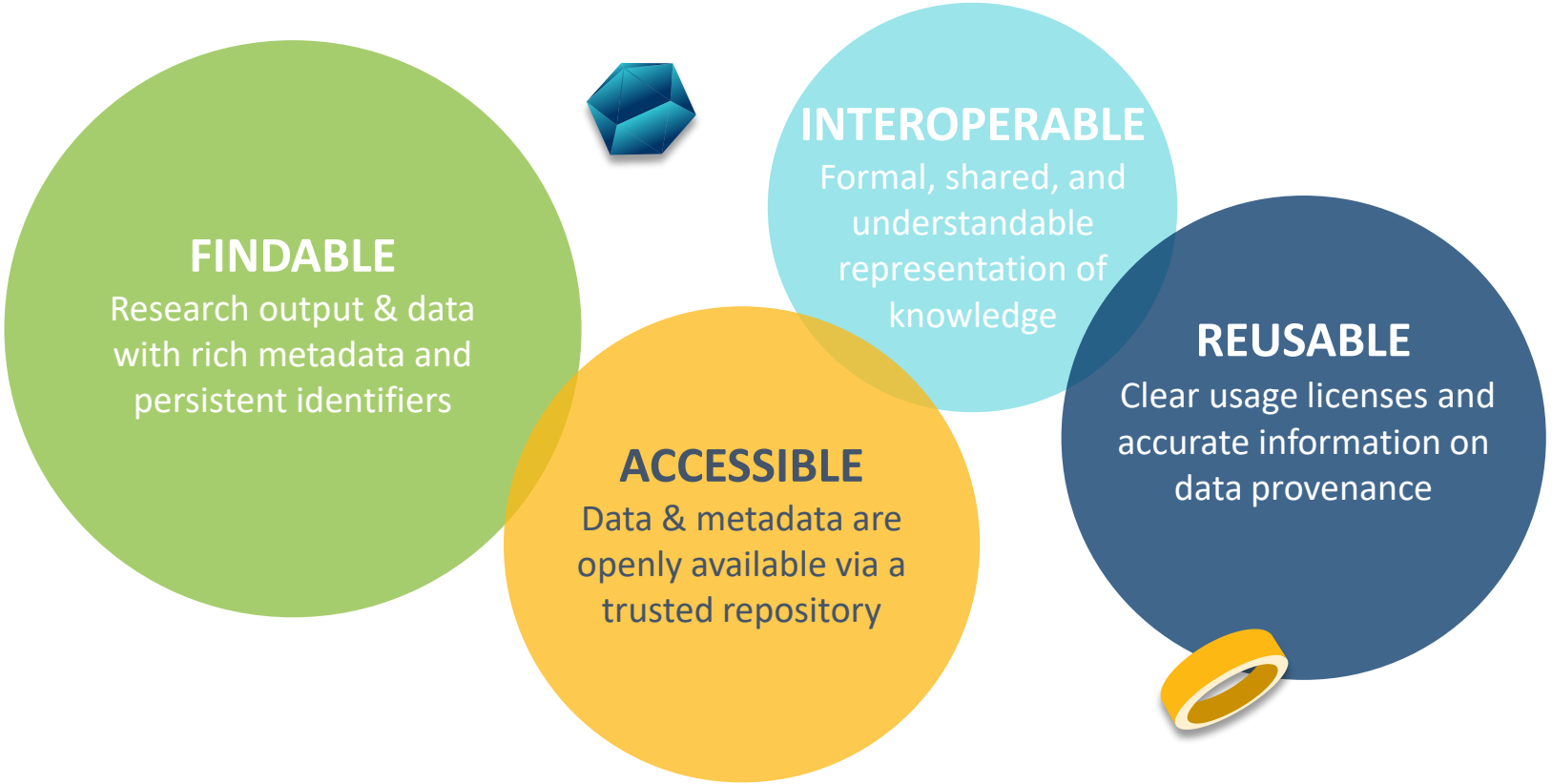
Open Research Standards – FAIR



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Supporting Transition to Plan S

Esploro enables customers to adopt Plan S guidelines with a compliant repository and workflows

- Complying with Plan S requirements for research repositories
  - Supporting OpenDOAR guidelines
  - Using Persistent Identifiers, such as DOIs, for deposited versions of the publications, authors, funders, grants, institutions, and more
  - Enabling rich, autopopulated metadata such as PID, version deposited, OA status, license, funding info
  - Standard interoperable metadata format for import and export
  - Manuscript submission system option – individual or bulk
  - Open APIs to allow access to the content in the repository
  - OpenAIRE compliance of the metadata
  - QA processes to link full-text deposits with authoritative bibliographic metadata
  - Robust global infrastructure for continuous availability
  - 24x7x365 support
- Comprehensive reporting on APC payments and APC management workflows

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Community Collaboration

Esploro "Community Zone"

- ✓ Data management plans
- ✓ Metadata tools
- ✓ Best practices
- ✓ KPIs & benchmarks
- ✓ Global profiles

Community collaboration platforms

- ✓ Development network
- ✓ Knowledge Center
- ✓ Idea Exchange

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The Esploro Difference

Integrated & Unified

Integrated workflows & discovery for research assets

More Content

Content is linked and connected, including non-STEM, creative work & data

Professional Curation

Including advanced and automatic Metadata enhancements

New & Innovative Model

Intelligent capture, automatic metadata population

Open & Extensible

open APIs and easily customizable solutions

Integrated Analytics

Cross functions analytics & Metrics

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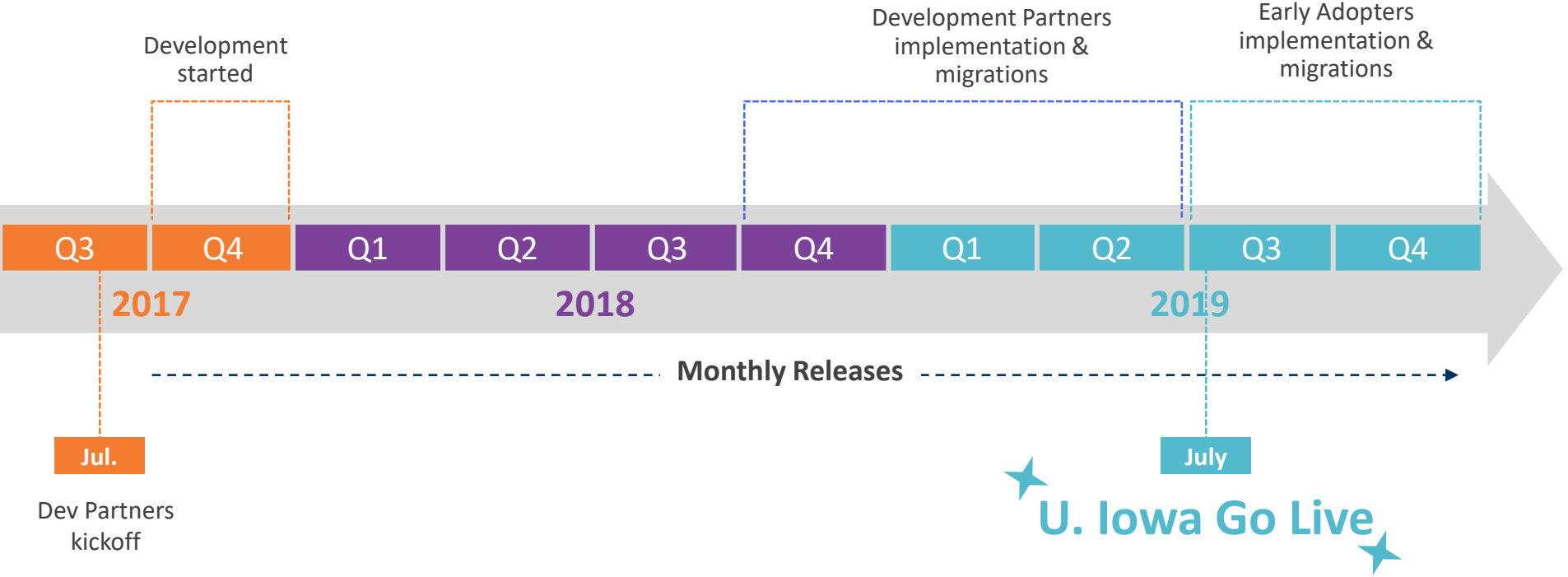
Esploro Timeline



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