Guidelines
Supporting interoperability for Data Archives

What are the OpenAIRE guidelines?
- Since 2010, the OpenAIRE Guidelines have been used to support content providers to build Europe’s Scholarly Knowledge Space and to comply with EC OA policies.
- They provide guidance on how:
  - to interpret and expose metadata,
  - to promote interoperability,
  - to get validated and aggregated into the OpenAIRE infrastructure.
- In collaboration with key stakeholders three sets of guidelines were developed, all based on existing well-established standards:
  - Guidelines for Literature Repositories using Dublin Core,
  - Guidelines for Data Repositories using DataCite Metadata Schema,
  - Guidelines for CRIS systems: based on CERIF-XML.
- Best practices for the use of transfer protocol (OAI-PMH), metadata formats and controlled vocabularies.

Why specific guidelines for data repositories & how do they work?
- OpenAIRE collects and exposes research datasets related to OA publications in OpenAIRE and/or with links to funding information.
- OpenAIRE has adopted the DataCite Metadata Schema as the basis for harvesting datasets since it provides a domain agnostic schema.
- The guidelines define how to specify:
  a) Funding information, b) Access rights and/or license, c) Related publications and datasets, d) Embargo date information.
- Validation/registration of OpenAIRE compatible data repositories.
- OpenAIRE harvests data archives via OAI-PMH using the set 'openaire_data' (optional).
- Regular aggregation from data repositories and inference of links to projects, related data and publications.

What’s in addition to the DataCite schema?
- OpenAIRE accepts other persistent identifier schemes and not only a DOI as identifier.
- OpenAIRE recommends exporting links to related publications and datasets via the ‘RelatedIdentifier’ property.
- OpenAIRE recommends using the ‘Contributor’ property to relate a dataset to funding information.
- DataCite optional properties ‘Date’ and ‘Description’ are mandatory in OpenAIRE.
- OpenAIRE uses ‘Rights’ property to explicitly declare the access right of the resource.

How to get involved?
- Find and discuss the guidelines at: guidelines.openaire.eu
- Test the compatibility and register the repository with a few clicks at: validator.openaire.eu
- Find help & support and more information: www.openaire.eu

Guidelines will continue to be developed in the OpenAIRE2020 project (2015-2018) funded by the EC Horizon 2020 Programme.

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