



# Мастер класс “С чего начать:

## Подготовка и создание архивов открытого доступа»

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eIFL.net

Презентация на совместном семинаре eIFL.net и ГПНТБ России  
«Открытый доступ и открытые архивы информации», 11 июня  
2009,

Шестнадцатая международная конференция «КРЫМ 2009»

# С чего начать

Рабочая группа:  
библиотека,  
администрация,  
IT, и т.д

# Предположение

- 1. Администрация принципиально согласна создавать репозитарий открытого доступа (РОД).*
- 2. Есть сервер для РОД или место на сервере*
- 3. Есть менеджер.*

**(Proposed checklist for the implementation  
of an Institutional Repository (IR)  
Developed by the Department of Library Services  
in the University of Pretoria, South Africa)**

# Что нужно ✓

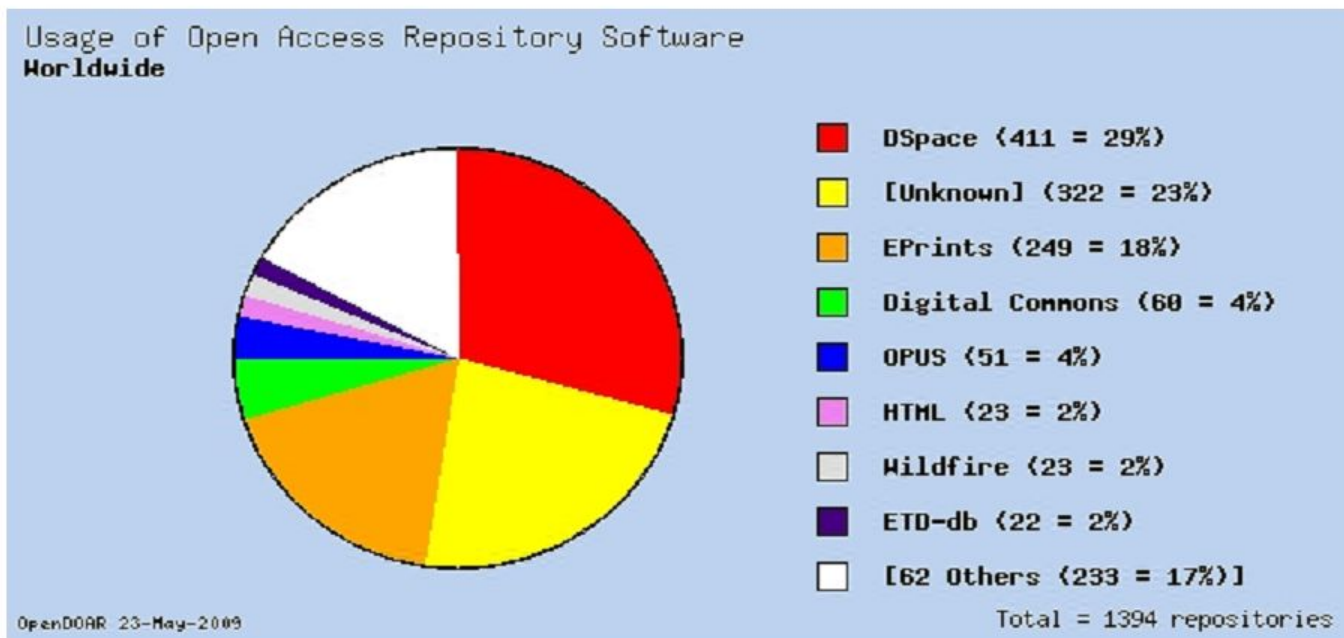
1. 1-4 сотрудника, с которых можно начать.
2. Анализ потребностей университета.
3. Анализ программного обеспечения.
4. Списки рассылок.
5. Имя РОД.

# OpenDOAR

## Directory of Open Access Repositories

Home | Find | Suggest | Tools | FAQ | About | Contact Us

### Usage of Open Access Repository Software - Worldwide



For further data, please see the corresponding [table of repositories](#) sorted by software platform.

If you would like to incorporate this chart in your own website, please copy and paste the following HTML source code into the relevant position in your web page:

```
<img src="http://www.opendoar.org/  
charts.php?groupby=r.rSoftWareName&orderby=Tally  
DESC&charttype=pie&width=600&height=300&caption=Usage  
of Open Access Repository Software - Worldwide" width="600"
```






Search

Building Repositories

Repository Software Survey, March 2009

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Product Comparison Table

Click on product name column headings to see individual data sheets with further data, links, and exemplar repositories.

Feature	CONTENTdm	Digital Commons	DigiTool	DSpace	EPrints	EQUELLA	Fedora	intraLibrary	Open Repository	VITAL	Zentify
Cost:	Commercial	Commercial	Commercial	Free	Free	Commercial	Free	Commercial	Commercial	Commercial	Free
<b>Supported Item Types (Storage and rendition)</b>											
Documents (pdf, doc, ppt,...):	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard
Images (jpeg, gif, png,...):	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard	current standard
Video (mpeg, avi,...):	current standard	current standard	current standard	current standard	current 3rd party	current standard	current standard	current standard	current standard	current standard	current standard
Audio (mp3, wav,...):	current standard	current standard	current standard	current standard	current 3rd party	current standard	current standard	current standard	current standard	current standard	current standard
Learning objects (scorm,...):	future standard	-	-	current optional	current 3rd party	current standard	current standard	current standard	current optional	current 3rd party	current standard
Other:	-	-	-	Websites, CAD drawings, 3D	Easily extensible for other types.	Can store & manage all content types	Can store & manage all content types	-	Websites, CAD drawings, 3D	-	Can store and manage all content types

Thumbnail Previews

Image Files:	current standard	current standard	current standard	current standard	current standard	current standard	current 3rd party	current standard	current standard	current standard	-
Video Files:	current standard	current standard	current standard	current standard	current 3rd party	current 3rd party	current 3rd party	-	future optional	current standard	-
PDF & Texts:	current standard	current standard	current standard	current standard	current standard	current standard	current 3rd party	-	current standard	current standard	-

User Interface Functions

Feature	CONTENTdm	Digital Commons	DigiTool	DSpace	EPrints	EQUELLA	Fedora	intraLibrary	Open Repository	VITAL	Zentify
End-user Deposition:	current standard	current standard	current standard	current standard	current standard	current standard	current 3rd party	current standard	current standard	current standard	current standard
Built-in PDF Making:	current standard	current standard	-	current 3rd party	current standard	current standard	-	-	current standard	current 3rd party	-

# Вопросы

- 1. Зачем Вашей организации репозитарий?**  
Цель, двигатели, и т.д.
- 2. Какое место** занимает репозитарий в информационном пространстве университета?
- 3. Контент?**
- 4. Политика интеллектуальной собственности.**

# Вопросы 2

**5. Роли и ответственность.**

**6. Отчеты и статистика.**

**7. Сообщества и коллекции.**

**8. Бизнес-план.**

**9. Сервисные соглашения?**

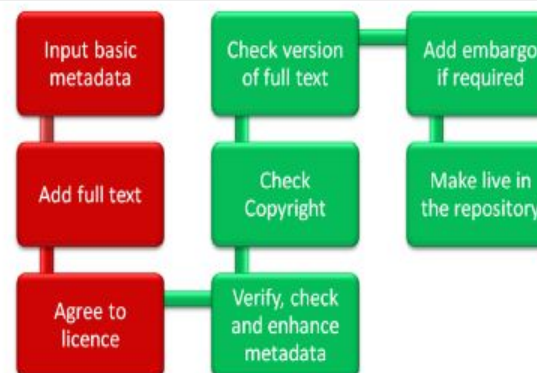
**10. Процедуры.**

(adaptation from the Repository Support Project, the UK: <http://www.rsp.ac.uk/>)



## Metadata input

- What metadata is going to be gathered from the authors?
- What metadata (if any) will be generated automatically?
- What metadata (if any) are administrators or other repository staff going to add to each record?
- What are the options for minimising free text fields?



## Permissions / copyright and licence handling

- Who is responsible for checking the copyright of each submission?
- At what stage in the process is this check completed and how are the decisions recorded in the metadata?
- When will the depositor sign a deposit agreement or licence?
- How are you going to deal with embargoes?

## File management

- What files are you requesting from the authors?
- What formats will you accept?
- How will associated files be identified and stored in the repository?
- How will you manage different versions of papers?

In the example above red stages are completed by the depositor with the green stages being completed by the repository administrator. Additional workflow stages and more complex workflow options may also be required. The type of quality control you implement will depend on the ethos and philosophy of your institution.

## Conclusion

This paper has outlined the importance of workflows within the repository and has illustrated how, in particular, implementing streamlined and efficient submission workflows can re-enforce positive benefits. A repository manager should devote some time to planning, testing and refining their workflows at an early stage of repository implementation. This is a task that sits well alongside configuring your repository software, defining your metadata scheme and implementing your deposit licence. More information about all these topics is available from the RSP web site.

# Что нужно 2 ✓

6. Зарегистрировать репозитарий в харвестерах, поисковиках, директориях, и т.д.

7. Менеджмент, маркетинг и тренинги.



# DRIVER Guidelines 2.0

## Guidelines for content providers - Exposing textual resources with OAI-PMH

[November 2008]



[Guidelines for Repository Managers and Administrators on how to expose digital scientific resources using OAI-PMH and Dublin Core Metadata, creating interoperability by homogenising the repository output.]





Building Repositories

Metadata & Workflow

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### Metadata

Metadata is information about information or data about data. An institutional repository will contain a metadata record for each item of content contained within it. The metadata can be collected at various stages during the ingest of an item into the repository.

In the context of an institutional repository metadata is needed to facilitate discovery of your repository content. Resource discovery of repository content is enabled through assigning relevant criteria to content items. Metadata:

- helps users identify resources.
- brings similar resources together.
- distinguishes dissimilar resources .
- gives location information.
- is essential to facilitate harvesting of your repository content by external systems.
- helps you organise your repository content and supports archiving and preservation.

A metadata scheme is a set of metadata elements designed for a specific purpose, such as describing a particular type of information resource. Repository administrators will need to define their metadata schemas at an early stage of repository installation. The schemas being used will vary depending on the types of content being stored, and an institutional repository manager is likely to need to define schemas for everything from the relatively simply text based materials being received through to more complex multimedia objects. When defining your schema it is important to consider local needs such as departmental and research structures and any local decisions needed about subject fields etc. Most people will also need to extend their schemas to new types of materials as the repository grows. Realistically and in the first instance most people will work with the metadata scheme which comes with the out of the box installation of their chosen software. However, extra fields can be added and schemas customised over time. [More information on metadata formats.](#)

### Subject classification

# REPOSITORIES SUPPORT PROJECT



## Metadata

[support@rsp.ac.uk](mailto:support@rsp.ac.uk)

### Overview

Metadata is information about information. According to NISO it is "structured information that describes, explains, locates, or otherwise makes it easier to retrieve, use, or manage an information resource"<sup>1</sup>. Objects stored in an institutional repository are always accompanied by metadata records. This briefing paper introduces the different uses of metadata within an institutional repository and explores how such metadata can be defined.

### Metadata in the repository

The primary function of metadata in an institutional repository is resource discovery. Resource discovery is enabled and enhanced by assigning relevant criteria to content items. This helps users identify resources, brings similar resources together, distinguishes dissimilar resources and gives location information. External systems

### Types of metadata

There are three main types of metadata:

- **Descriptive:** Facilitates resource discovery and identification; includes elements such as item titles, authors and keywords.
- **Structural:** Describes how items relate to one another; particularly important for recording versions of an item over time and for dealing with complex items such as chapters within a book.
- **Administrative:** Helps manage the resource itself; it includes rights management and preservation metadata that records how files were created and the rights associated with them.

### Defining your metadata schema

Metadata schemas are sets of metadata elements



## References & further information :

**<sup>1</sup> NISO Understanding Metadata**

<http://www.niso.org/standards/resource/UnderstandingMetadata.pdf>

**<sup>2</sup> OAI-PMH - Open Archives Initiative-Protocol for Metadata Harvesting**

<http://www.openarchives.org/>

**<sup>3</sup> Dublin Core**

<http://www.dublincore.org/>

**<sup>4</sup> METS – Metadata Encoding & Transmission Standard**

<http://www.loc.gov/standards/mets/>

**<sup>5</sup> MODS - Metadata Object Description Schema**

<http://www.loc.gov/standards/mods/>

**<sup>6</sup> DIDL - Digital Item Declaration Language**

<http://xml.coverpages.org/MPEG21-WG-11-N3971-200103.pdf>

**<sup>7</sup> PREMIS - PREservation Metadata Implementation Strategies**

<http://www.odc.org/research/projects/pmwg/>

**<sup>8</sup> SWAP - Scholarly Works Application Profile**

[http://www.ukoln.ac.uk/repositories/digirep/index/Eprints\\_Application\\_Profile](http://www.ukoln.ac.uk/repositories/digirep/index/Eprints_Application_Profile)

**<sup>9</sup> ETHOS - UK Electronic Theses and Dissertations qualified Dublin Core (UKETD\_DC)**

[http://ethos toolkit.rgu.ac.uk/wp-content/ethos-content/UKETD\\_DC.htm](http://ethos toolkit.rgu.ac.uk/wp-content/ethos-content/UKETD_DC.htm)

**<sup>10</sup> Images Application Profile**

[http://www.ukoln.ac.uk/repositories/digirep/index/Images\\_Application\\_Profile](http://www.ukoln.ac.uk/repositories/digirep/index/Images_Application_Profile)

**Repositories Support Project**

<http://www.rsp.ac.uk>

The Repositories Support Project (RSP) aims to coordinate and deliver good practice and practical advice to HEIs to enable the implementation, management and development of digital institutional repositories.





# Handling Version Information

support@rsp.ac.uk

## Overview

Academic researchers typically produce many revisions of a research output, up to 60 in some cases. By adding version information to papers, with clear links to published versions, it is possible to allay concerns about the quality of different versions. The briefing paper provides recommendations for handling versions within digital repositories.

The **VERSIONS Project** conducted a study, including two surveys and 26 interviews, to address the uncertainties relating to versions of academic papers in repositories.

The **Version Identification Framework (VIF)** provides guidance and solutions for repository managers, content creators and software developers about identifying versions of any type of digital object.

### VERSIONS: User requirements and attitudes

<b>Draft</b>	Early version circulated as work in progress
<b>Submitted Version</b>	The version that has been submitted to a journal for peer review
<b>Accepted Version</b>	Author-created version incorporating referee comments and is accepted for publication
<b>Published Version</b>	The publisher-created published version
<b>Updated Version</b>	A version updated since publication

Table 1. Recommended terms for describing versions of journal papers

81% of authors surveyed stated they would deposit their final Accepted Versions of journal articles in an institutional repository 'if invited to do so'. Adding version information to authors' papers, with clear links to published versions, helps allay concerns about the quality of accepted versions and about potential loss of downloads for published versions.



### What are workflows?

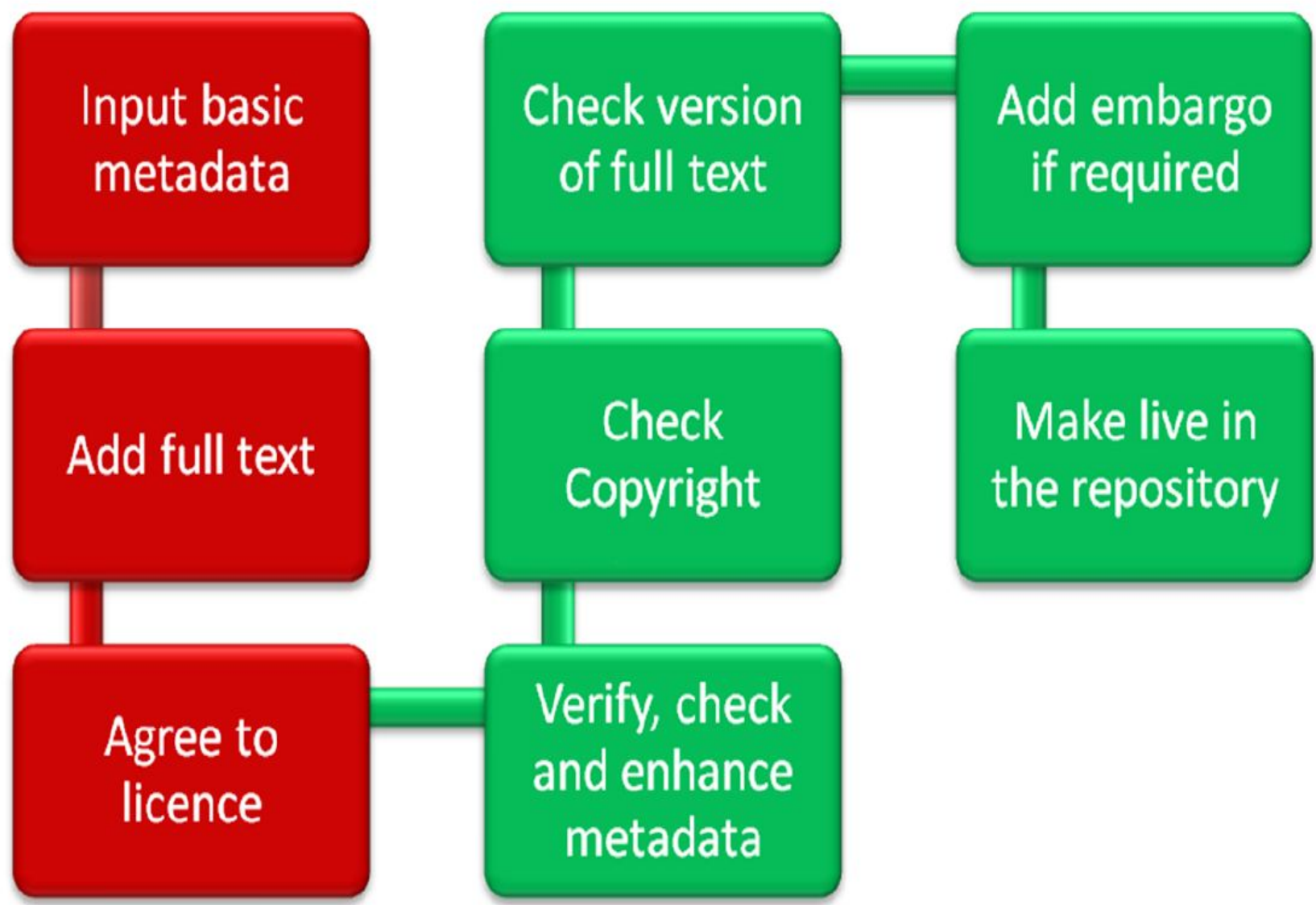
Workflows are a break-down of the administrative tasks needed within a repository. They allow the various activities involved in running a repository to be assigned to the individuals or groups who are best able to deal with them.

The process of defining workflows is closely aligned with a stakeholder analysis of those involved with the repository: once you have identified the benefits and issues relevant to each stakeholder group, the next step is to ask exactly *how* users are going to interact with the repository software, and what specific tasks they are going to complete.

### The benefits of submission workflows

There are several benefits to creating submission workflows within the repository:

- **Streamlines the deposit process** – a comprehensive submissions workflow minimises effort and simultaneously ensures capture of all required information without duplication of effort or heroic measures.
- **Encourages user deposits** – A user-friendly submissions workflow can encourage academics to deposit more items.
- **Integrates quality assurance** – building checking stages into workflows allows items or metadata to be double checked for accuracy and consistency early in the life of the item.





  
Search

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## Tools and Add-ons

[PDF-making](#) | [SHERPA/ROMEO](#) | [OpenDOAR Policy Tool](#)

### PDF-Making Software

Although their usefulness is a matter of debate, the most common file format used in Open Access repositories is PDF (Portable Document Format). PDF was originally developed by Adobe, and Adobe Acrobat Professional remains the gold standard package for generating PDFs (n.b. not just the Adobe Acrobat reader). It is expensive, but in a mediated repository service, it is appropriate for mediators to have the full version.

The situation is more problematic, however, with self-deposition. Authors need to be able to create PDFs themselves, and it probably will not be justifiable on cost grounds to give them all the full Adobe Acrobat. Furthermore, some repositories have reported that people having to locate and install their own PDF making software can be a barrier to deposition. Even the adjustment to printing rather than saving documents to turn them into PDFs can be confusing for some authors. And merging separate files and images to form a single document can also be a significant challenge.

Cheaper or free alternatives to Adobe Acrobat are available that may be suitable for institution-wide distribution. A notable example is the MS Office 2007 add-in `SaveAsPDF.exe` that can be installed locally to allow easy conversion to PDF. Products include:

- **Adobe Acrobat**
  - <http://www.adobe.com/products/acrobat/>
- **2007 Microsoft Office Add-in - 'Save as PDF'**
  - <http://www.microsoft.com/downloads/>
- **PDF Converter Pro** - Nuance Communications
  - <http://www.nuance.com/pdfconverter/>
- **pdfFactory**

# Сервисы

Актуальные CV

Бек-ап

Статистика использования

Списки публикаций, библиография

Печать по востребованию

Менеджмент и оценка качества исследований

Персональные веб-страницы

Маркетинг

Виртуальная среда обучения

Трудоустройство студентов

# OpenDOAR

Directory of Open Access Repositories

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## The Directory of Open Access Repositories - OpenDOAR

[Search for repositories](#) | [Search repository contents](#) | [List of repositories](#) | [Repository Statistics](#)

OpenDOAR is an authoritative directory of academic open access repositories. Each OpenDOAR repository has been visited by project staff to check the information that is recorded here. This in-depth approach does not rely on automated analysis and gives a quality-controlled list of repositories.

As well as providing a simple [repository list](#), OpenDOAR lets you [search for repositories](#) or [search repository contents](#). Additionally, we provide tools and support to both repository administrators and service providers in sharing best practice and improving the quality of the repository infrastructure. Further explanation of these features is given in a project document [Beyond the list](#).

The current directory lists repositories and allows breakdown and selection by a variety of criteria - see the [Find](#) page - which can also be viewed as [statistical charts](#). The underlying database has been designed from the ground up to include in-depth information on each repository that can be used for search, analysis, or underpinning services like text-mining. The OpenDOAR service is being developed incrementally, developing the current service as new features are introduced. A list of [Upgrades and Additions](#) is available.

Developments will be of use both to users wishing to find original research papers and for service providers like search engines or alert services which need easy-to-use tools for developing tailored search services to suit specific user communities.

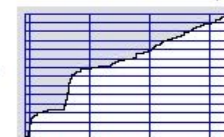
The importance and widespread support for the project can be seen in its funders, led by the [Open Society Institute](#) (OSI), along with the [Joint Information Systems Committee](#) (JISC), the [Consortium of Research Libraries](#) (CURL) and [SPARCEurope](#).

OpenDOAR has also been identified as a key resource for the Open Access community ([K.B. Oliver & R. Swain, 2006](#) - PDF), and was one of the services which contributed to SHERPA being awarded the [SPARC Europe Award for Outstanding Achievements in Scholarly Communications](#).

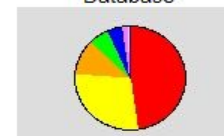
More information on the project is available on this site through the [About](#) page.

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OpenDOAR has  
over 1300 listings!



Growth of the OpenDOAR Database



Repositories by Continent





## Search or Browse for Repositories

[Recent Additions](#) [RSS1 Feed](#)

Any Subject Area  Any Content Type  Any Repository Type   
Any Country  Any Language  Any Software    
Summaries  20  per page. Sort by:    
To search the *contents* of the repositories listed in *OpenDOAR*, please see our [trial search page](#).

Results 1 - 20 of 1394.

Page: << Previous 1 2 3 4 5 6 7 8 9 10 Next >>

### [MyManuskrip: Digital Library of Malay Manuscripts \(Pustaka Digital Manskrip Melayu\)](#)

**Organisation:** [Faculty of Computer Science and Information Technology, University of Malaya \(UM\)](#), Malaysia

**Description:** This site provides access to the manuscript content and manuscript research from Malaysia. The interface is in English.

**Software:** Greenstone

**Size:** 50 items (2008-09-22)

**Subjects:** Multidisciplinary; History and Archaeology; Library and Information Science

**Content:** Books; Multimedia

**Languages:** English

**Policies:** Metadata re-use policy explicitly undefined; Full data item policies explicitly undefined; Content policies explicitly undefined; Submission policies explicitly undefined; Preservation policies explicitly undefined

### [11th Joint Symposium on Neural Computation](#)

**Organisation:** [Caltech](#) (California Institute of Technology), United States

**Description:** This is a closed subject based repository containing papers from this 2004 conference. Part of the Caltech Online Digital Archives (CODA) project.

**OAI-PMH:** <http://jnc.library.caltech.edu/perl/oai2>

**Software:** EPrints

**Size:** 30 items (2009-02-10)

**Subjects:** Computers and IT

**Content:** Conferences

**Languages:** English

**Policies:** Metadata re-use permitted for not-for-profit purposes; Harvesting full data items by robots prohibited; Content policies explicitly undefined; Submission policies defined; Preservation policies not stated

### [Aalborg University - Electronic Library](#)

**Organisation:** [Aalborg Universitetsbiblioteks, Aalborg Universitet](#), Denmark

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## Tools for Repository Administrators

### [Application Programmers' Interface \(API\)](#)

The API is a machine-to-machine interface that lets applications run a wide variety of queries against the *OpenDOAR* Database and return the results as XML data. You can choose to retrieve just repository titles & URLs (suitable for OAI-PMH harvesting), or all the available *OpenDOAR* data, or intermediate levels of detail. You can then incorporate the output into your own applications and 'mash-ups'. [PowerPoint Demo](#)

### [OpenDOAR Charts](#)

The chart pages that can be viewed using *OpenDOAR*'s [Find](#) facility also provide HTML source code to let you copy and paste the charts into your own web pages. These are dynamic, so the charts will reflect the changes to *OpenDOAR* as it is updated. Our JISC [PowerPoint Demo](#) shows how to use this tool.

### [Email Distribution Service](#)

This service has been set up to provide repository administrators, service providers and researchers with a bespoke email redistribution service. Through using a series of menus and options on the [request form](#) it is possible to address directly a specific portion of the *OpenDOAR* listed repositories. Emails are filtered by *OpenDOAR* staff in terms of content and suitability before redistribution. See the [service scope](#) for full details.

### [Policies Tool](#)

Using check boxes and pick lists, this tool helps administrators to formulate and/or present their repository's policies. Having a clear policy on the re-use of deposited items helps search service providers, which in turn helps to maximise the impact of your organisation's research, and to further the aims of the Open Access movement. Output options include: HTML for use in your website, and text formatted for EPrints configuration files. [PowerPoint Demo](#)

### [OpenDOAR Search](#)

We have launched a trial service of [OpenDOAR Search](#), which uses the excellent [Google Custom Search Engine](#) to offer full-text search of repositories listed in *OpenDOAR*. This service does not use the OAI-PMH protocol, or the metadata held within repositories. Instead, it relies on Google's indexes, which in turn rely on repositories being suitably structured and configured for the Googlebot web crawler.

If you are an administrator and your material is not being retrieved, first check that your repository is listed in [OpenDOAR](#). If it is listed, you may need to review your set-up against Google's [Guidelines for Webmasters](#) and see the related pages in the [Webmaster Help Center](#), especially the FAQ on [how Google crawls sites](#).

There is also more [general advice](#) for configuring your repository to work with Google, given by [Peter Suber](#).

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# OpenDOAR

## Policies Tool

[Introduction](#) | [Purpose of this Tool](#) | [Non-Aims](#) | [Policies Covered](#) | [Customisation](#) | [EPrints Software](#) | [Demonstration](#)

Repository name *	<input type="text"/>
Repository URL *	<input type="text" value="http://"/>
OAI Base URL *	<input type="text" value="http://"/>

\* Optional but recommended information.

### Introduction

In a survey for OpenDOAR in early 2006, Peter Millington discovered that about two thirds of Open Access repositories did not have publicly stated policies for the permitted re-use of deposited items or for such things as submission of items, long term preservation, etc. This complicates matters for organisations wishing to provide search services, which in turn reduces the visibility and impact of these repositories.

### Reference

Peter Millington (2006) [Moving Forward with the OpenDOAR Directory](#), 8th International Conference on Current Research Information Systems, Bergen, 11th-13th May 2006

### Purpose of this Tool

To improve the situation, OpenDOAR has created this simple tool to help repository administrators to formulate and/or present their repository's policies. It provides a series of check boxes and pick lists for all the key policy options, which can be very quickly selected.

We have even provided recommended options for minimum compliance with the aims of the Open Access movement, and for optimising usage of your repository. For example, the minimum policy recommends allowing re-use of metadata for not-for-profit purposes, but prohibits commercial re-use. On the other hand, the optimum policy also allows free commercial re-use because the extra exposure this gives to your material probably outweighs any disadvantages.

Several output formats are provided, including: HTML (for inclusion in your website), plain text, and source code for EPrints software configuration files ([see below](#)). Other formats may follow. We welcome suggestions.

### Non-Aims

This tool is not intended to generate policy statements for legal purposes. The emphasis is on clear plain language for repository users. If your lawyers wish to be more specific, we recommend you put legal statements on separate web pages. This tool lets you include links to such pages, if you wish.

### Policies Covered

- **Metadata Policy**- for information describing items in the repository.

Access to metadata; Re-use of metadata

- **Data Policy** - for full-text and other full data items.

# OpenDOAR

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### Define Repository Policies

#### Unnamed Repository

OAI Base URL: Not known

#### POLICIES

**Metadata Policy** for information describing items in the repository

Policy not yet defined

Add

**Data Policy** for full-text and other full data items

Policy not yet defined

Add

**Content Policy** for types of document & data set held

Policy not yet defined

Add

**Submission Policy** concerning depositors, quality & copyright

Policy not yet defined

Add

**Preservation Policy**

Policy not yet defined

Add

#### OUTPUT OPTIONS

Define Repository Policies  HTML Source  Text Only  EPrints 2 or 3 Web Page  EPrints Config Source

OK

Reset

Exit



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## Metadata Policy for information describing items in the repository

The policy currently declared in the OAI configuration is:

Unable to harvest the current policy - no OAI Base URL available.

Use this form to specify your policy in standard *OpenDOAR* Terms, or...

+ [Set OpenDOAR minimum recommended options](#)

‡ [Set optimum recommended options](#)

### Access to Metadata

- Anyone may access the metadata free of charge. +‡
- Access to some or all of the metadata is controlled.

### Re-Use of Metadata

- No metadata re-use policy defined. Assume no rights at all have been granted.
- Metadata re-use policy (*Please specify*):

- The metadata **may** be re-used in any medium without prior permission +‡
  - for not-for-profit purposes +‡
  - and re-sold commercially ‡
  - the OAI Identifier or a link to the original metadata is given. +‡
  - the repository is mentioned.
- The metadata **must not** be re-used in any medium for
  - commercial purposes + - without formal permission.
  - not-for-profit purposes

### For more information



# OpenDOAR

Directory of Open Access Repositories

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## Metadata Policy for information describing items in the repository

The policy currently declared in the OAI configuration is:

Unable to harvest the current policy - no OAI Base URL available.

Use this form to specify your policy in standard *OpenDOAR* Terms, or...

+ [Set OpenDOAR minimum recommended options](#)

‡ [Set optimum recommended options](#)

### Access to Metadata

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  - for not-for-profit purposes +‡
  - and re-sold commercially ‡
  - the OAI Identifier or a link to the original metadata is given. +‡
  - the repository is mentioned.
- The metadata **must not** be re-used in any medium for
  - commercial purposes + - without formal permission.
  - not-for-profit purposes

### For more information





# OpenDOAR

Directory of Open Access Repositories

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## Define Repository Policies

### Unnamed Repository

OAI Base URL: Not known

#### POLICIES

##### Metadata Policy for information describing items in the repository

1. Anyone may access the metadata free of charge.
2. The metadata may be re-used in any medium without prior permission for not-for-profit purposes and re-sold commercially provided the OAI Identifier or a link to the original metadata record are given.

Edit

##### Data Policy for full-text and other full data items

Policy not yet defined

Add

##### Content Policy for types of document & data set held

Policy not yet defined

Add

##### Submission Policy concerning depositors, quality & copyright

Policy not yet defined

Add

##### Preservation Policy

Policy not yet defined

Add

#### OUTPUT OPTIONS

### Define Repository Policies

#### Nottingham ePrints

OAI Base URL: <http://eprints.nottingham.ac.uk/perl/oai2>

##### POLICIES

**Metadata Policy** for information describing items in the repository

1. Anyone may access the metadata free of charge.
2. The metadata may be re-used in any medium without prior permission for not-for-profit purposes and re-sold commercially provided the OAI Identifier or a link to the original metadata record are given.

Edit

**Data Policy** for full-text and other full data items

1. Anyone may access full items free of charge.
2. Copies of full items generally can be:
  - o reproduced, displayed or performed, and given to third parties in any format or medium
  - o for personal research or study, educational, or not-for-profit purposes without prior permission or charge.provided:
  - o the authors, title and full bibliographic details are given
  - o a hyperlink and/or URL are given for the original metadata page
  - o the content is not changed in any way
3. Full items must not be harvested by robots except transiently for full-text indexing or citation analysis
4. Full items must not be sold commercially in any format or medium without formal permission of the copyright holders.
5. This repository is **not** the publisher; it is merely the online archive.
6. Mention of the repository is appreciated but not mandatory.

Edit

**Content Policy** for types of document & data set held

1. This is an institutional or departmental repository.
2. The repository holds all types of materials except: Theses and dissertations
3. Papers may include:
  - o unpublished pre-prints (not peer-reviewed)
  - o final peer-reviewed drafts (post-prints)
  - o published versions
4. Papers are individually tagged with their peer-review and publication status.
5. Principal language: English

Edit

## Nottingham ePrints - Policies

### Metadata Policy for information describing items in the repository

1. Anyone may access the metadata free of charge.
2. The metadata may be stored in any medium without prior permission for not-for-profit purposes and may be commercially provided to third parties so long as the original metadata records given.

### Data Policy for full-text and other full data items

1. Anyone may access full items free of charge.
2. Copies of full items generally can be:
  - o reproduced, displayed or performed, and given to third parties in any format or medium
  - o for personal research or study, educational or not-for-profit purposes without prior permission or charge.

provided:

- o the author, title and full bibliographic details are given
  - o a hyperlink and/or URL are given for the original metadata page
  - o the content is not changed in any way
3. Full items may be licensed by the copyright owner only for full-text mining or data analysis
  4. Full items may be sold commercially in any format or medium without formal permission of the copyright holder.
  5. This repository is not the publisher; it is merely the online archive.
  6. Mention of Nottingham ePrints is appreciated but not mandatory.

### Content Policy for types of document & dataset held

1. This is an institutional departmental repository.
2. Nottingham ePrints holds all types of materials except theses and dissertations.
3. Papers may include:
  - o unpublished pre-print (not peer-reviewed)
  - o final peer-reviewed draft (post-print)
  - o published versions
4. Papers are individually tagged with their peer-reviewed publication status.
5. Principal Language: English.

### Submission Policy concerning deposition, quality & copyright

1. Items may only be deposited by accredited members of the institution or their designated agent.
2. Authors may only submit their own work for archiving.
3. The administrator only accepts items for the eligibility of authors deposition, submission to the scope of Nottingham ePrints, valid copyright format and the ownership of



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- Deposit Guide
- Register
- User Area
- Open Access Support
- About
- Statistics
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## Policies

### Metadata Policy

for information describing items in the repository

1. Anyone may access the metadata free of charge.
2. The metadata may be re-used in any medium without prior permission for not-for-profit purposes and re-sold commercially provided the OAI Identifier or a link to the original metadata record are given.

### Data Policy

for full-text and other full data items

1. Anyone may access full items free of charge.
2. Copies of full items generally can be:
  - o reproduced, displayed or performed, and given to third parties in any format or medium
  - o for personal research or study, educational, or not-for-profit purposes without prior permission or charge.provided:
  - o the authors, title and full bibliographic details are given
  - o a hyperlink and/or URL are given for the original metadata page
  - o the content is not changed in any way
3. Full items must not be harvested by robots except transiently for full-text indexing or citation analysis
4. Full items must not be sold commercially in any format or medium without formal permission of the copyright holders.
5. This repository is **not** the publisher; it is merely the online archive.
6. Mention of Nottingham ePrints is appreciated but not mandatory.

### Content Policy

for types of document & data set held



# Спасибо SHERPA!

Особенно

Peter Millington, Technical Development Officer

# Политики ОД

Требовать или рекомендовать –  
лучше требовать.

## **Open access policy options for funding agencies and universities**

(Based on The SPARC Open Access Newsletter, issue #130 and The SPARC  
Open Access Newsletter, issue #127,

by Peter Suber:

<http://www.earlham.edu/~peters/fos/newsletter/02-02-09.htm>

and <http://www.earlham.edu/~peters/fos/newsletter/11-02-08.htm>)



# Политики ОД

Зеленый или золотой пути?

Рекомендовать золотой (публикации в журналах ОД), требовать – зеленый (репозитарии ОД)

# Политики ОД

Что архивировать?

Окончательную версию авторской  
отрецензированной рукописи.

Данные.

Ссылка на напечатанную статью для  
цитирования.

И т.д.

# Политики ОД

Что архивировать?

Результаты исследований,  
профинансированных частично или  
полностью.

# Политики ОД

Ембарго?

Не больше 6 месяцев. Чем короче,  
тем лучше.



# Политики ОД

Исключения?

Патенты.

Книги.

Гостайна, и т.д.



- navigation
- Main Page
  - Recent changes
  - Content
  - Projects
  - Categories
  - Practice editing
  - Help

- community
- Community portal
  - Countries
  - Web chat
  - Mailing list
  - Bounties
  - sitesupport

search

Go Search

- my collection
- Add article
  - Show collection (0 articles)
  - Collections help

- toolbox
- What links here
  - Related changes
  - Special pages

page discussion view source history

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# Otago Polytechnic/Intellectual property

< [Otago Polytechnic](#)



## Contents [hide]

- 1 Purpose
- 2 Statutory Compliance
- 3 National Guidelines
- 4 Policy and Procedures
  - 4.1 Definitions of IP
- 5 Policy
  - 5.1 Ownership of IP and outputs arising from intellectual activity
  - 5.2 Students IP
  - 5.3 Māori IP
  - 5.4 Attribution of Ownership of IP
  - 5.5 Disputes
  - 5.6 Plagiarism
- 6 Referral Documents

## Purpose

Otago Polytechnic wishes to foster research and development that advances knowledge and scholarship; and to support projects where that leads to marketable products or services.

The Polytechnic:

- has a preference for the open sharing of information, knowledge and resources
- recognises that intellectual property (IP) is owned by the creator, unless there are specific agreements to the ownership of IP by others, and
- wishes to foster the empowerment of individuals in their endeavours in a protective and/or promotional framework for individual creators associated with Otago Polytechnic.

The policy recognises that the Polytechnic will accrue benefits from the outcomes of the IP created by the intellectual activity of its staff and students and the dissemination and sharing of these outcomes.

The Polytechnic wishes to support free and open access to IP generated through the "Creative Commons" attribution process.

All IP that is brought into the Polytechnic belongs with the creators/owners of that IP.

A screenshot of a web browser window displaying the Science Commons Scholar's Copyright Addendum Engine page. The browser's address bar shows the URL 'http://scholars.sciencecommons.org/'. The page features a dark blue header with the Science Commons logo on the right. The main content area is white and contains the following sections: a title 'Scholar's Copyright Addendum Engine', a paragraph explaining the tool's purpose, a blue link '(get started)', a 'Description' section, a 'Science Commons / SPARC Addendum' section, and 'Other Options From Science Commons' which includes 'Immediate Access' and 'Delayed Access'.

# Scholar's Copyright Addendum Engine



The Scholar's Copyright Addendum Engine will help you generate a PDF form that you can attach to a journal publisher's copyright agreement to ensure that you retain certain rights.

[\(get started\)](#)

## Description

Each addendum gives you non-exclusive rights to create derivative works from your Article and to reproduce, distribute, publicly perform, and publicly display your article in connection with your teaching, conference presentations, lectures, other scholarly works, and professional activities. However, they differ with respect to how soon you can make the final published version available and whether you can authorize others to re-use your work in various ways. Below is a summary of the available options.

## Science Commons / SPARC Addendum

### Access - Reuse:

You retain sufficient rights to grant to the reading public a Creative Commons Attribution Non Commercial license or similar license that allows the public to re-use or re-post your article so long as you are given credit as the author and so long as the reader's use is non-commercial. (This is a joint offering from Science Commons and SPARC and represents a new version of the former SPARC Addendum.)

## Other Options From Science Commons

### Immediate Access:

You retain sufficient rights to post a copy of the published version of your article (usually in pdf form) online immediately to a site that does not charge for access to the article. (This is similar in many ways to the MIT Copyright Amendment below)

### Delayed Access:



1. Enter the information requested and

**Manuscript Title**

**Journal**

**Author Information**

**Publisher**

Type the name of the publisher of the journal or publication in which the article will appear. This name can usually be found in the copyright assignment agreement provided by the publisher or on the masthead of the publication.

gdhjks

- 2. Save the PDF addendum.
- 3. Print the addendum.
- 4. Sign and date the publisher's form, write: "Subject to the terms of the Creative Commons license, I agree to publish this work under the terms of the Creative Commons license." Make it clear that your signature is for the publisher's use only if the publisher accepts you Addendum.
- 5. Make a copy of all three documents (the publisher's form, your Addendum, and your cover letter) for your records.
- 6. Staple the three original documents together.
- 7. Mail the three original documents to the publisher.

Download file

File	agreement.pdf
Server	scholars.sciencecommons.org
Type	application/pdf
Size	4,6 KB (4 674 bytes)
Opens with	Adobe Reader 8.1 <span>Change...</span>

Would you like to Open or Save the file?

Remember choice and do not show dialog again

Open Save Cancel Help

... on the publisher's  
... use you want to make  
... only if the publisher

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Use this site to find a summary of permissions that are normally given as part of each publisher's copyright transfer agreement.

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Search  **Journal titles**  **Publisher names**  
for    
find  **contains** or  **starts with** or  **Exact phrase only**  **ISSN**

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- [American Bar Association](#) - 12-May-2009
- [International Reading Association](#) - 05-May-2009



ECP-2006-DILI-510001

NEEO

## First Report on IPR issues

<b>Delivery date</b>	<i>29 February 2008</i>
<b>Status</b>	<i>Final</i>
<b>Author(s)</b>	<i>Martin Reid, UCL</i>



*eContentplus*

This project is funded under the *eContentplus* programme<sup>1</sup>,  
a multiannual Community programme to make digital content in Europe more accessible, usable and exploitable.



### 3. USEFUL DOCUMENTATION

#### 3.1 Model letters/emails to publishers requesting full-text deposit

3.2 *Where there is no explicit permission given to mount full-text on a repository, it is often worthwhile writing or emailing directly to the publisher. This template can be used to form a letter to a publisher requesting permission to mount material on a repository on behalf of an academic author.*

Dear [insert name of publisher's rights manager or similar],

I am contacting you on behalf of Professor/Dr [insert name of author] who is a contributing author to one of your journals.

Professor/Dr [insert name of author] is a member of staff here at the University of [name of institution] and would like to deposit the full text of the following article(s) from [insert journal name] in the University's institutional repository. Professor/Dr [insert name of author] has authorised me to do this on [his/her] behalf and to contact you to seek permission to do this.

Article:

[authors names] , [date], [title]

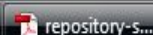
[journal name], [volume or number], [pages]

The institutional repository is a not-for-profit service for our academic authors, providing access to the full-text of their publications. Full bibliographic details are given for each article, including the journal of original publication, etc.

If possible, it is preferred to archive the finalised pdf version as it appears in print. The pdf version has an advantage over mounting the author's own version, in that it maintains consistency in appearance of the article wherever it is read. This also maintains a closer association of the article with the Journal, through the header-title and journal house-style.

I would be grateful if you could contact me to give your permission for including this article and to pass on any conditions that are associated. If it would be possible to use the published pdf version of the article for this purpose, then please confirm this.

Thank you for your attention with this and I look forward to hearing from you.



3.3 *Some publishers insist on the author writing or emailing them directly to request permission to mount eprints in a repository. In such cases, it may be useful to provide the author with a template such as the one below to help them construct their request.*

Dear [insert name of publisher's rights manager or similar],

I am writing to ask permission to mount a copy of an article of mine which was published in one of your journals in my institution's repository.

The article is:

[authors names] , [date], [title]

[journal name], [volume or number], [pages]

The institutional repository is a not-for-profit service for academic authors, providing access to the full-text of their publications. Full bibliographic details are given for each article, including the journal of original publication, etc.

If possible, I would like to use the finalised pdf version as it appears in print. The pdf version has an advantage over mounting my own version, in that it maintains consistency in appearance of the article wherever it is read. This also maintains a closer association of the article with the Journal, through the running headers and the journal house-style.

I would be grateful if you could contact me to give your permission for including this article and to pass on any conditions that are associated. If it would be possible to use the published pdf version of the article for this purpose, then please confirm this.

Thank you for your attention with this and I look forward to hearing from you.



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**[Square brackets are used in this Sample Licence to indicate that information needs to be inserted or that alternative terms can be used. The requested information should be inserted or the option selected or deleted as appropriate.]**

THIS LICENCE is made on:

BETWEEN: **[Insert: Name of Institution]** ("Repository")

AND: **[Insert: Name of person depositing material into Repository]** ("Depositor")

### RE CITALS

- A. The Depositor is the owner **[or co-owner]** of copyright in the material that is being deposited into the digital repository or has been authorised by the owners of copyright to deposit the material into the digital repository and to make it available under this Licence.
- B. The Depositor is the author **[or co-author]** of the material being deposited into the digital repository and as such has moral rights in the material.
- C. The Repository agrees to store the material in the digital repository and to make it available for access by other persons on the terms set out in this Licence.
- D. The Repository agrees to make the material available for access and viewing in the digital repository and any additional uses permitted by the End-User Agreement selected by the Depositor under this Licence.
- E. By entering into this Licence and depositing the material into the digital repository, the Depositor does not thereby assign copyright in the material and does not consent to any acts or omissions that would otherwise infringe their moral rights, except to the extent indicated in this Licence.
- F. The owner of copyright in the material reserves the right to make the material available in other locations and media.

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1. **End-User** means a person accessing the Item made available by the Repository in the digital repository.  
**Item** means the material provided by the Depositor to the Repository for inclusion in the digital repository, including the data, metadata and abstract of the material, and which is subject to the terms of this Licence.  
**Licence** means this Repository Deposit Licence.  
**End-User Agreement** means the licence selected by the Depositor under Clause 11(2) of this Licence.



*Term of Licence*

2. This Licence commences on the day on which it is agreed to by the parties and continues for the duration of copyright in the Item or until terminated in accordance with the terms of this Licence.

*Depositor's Declaration*

3. The Depositor declares that the Depositor:

- (a) (i) is the owner of copyright in the Item, or
- (ii) has the permission of the owner/s of copyright to grant to the Repository and End-Users the rights granted by this Licence; and
- (b) has moral rights in the Item.

*Depositor's Representations and Warranties*

4. (1) The Depositor represents and warrants that:

- (a) the Item is the Depositor's original work, and does not, to the best of the Depositor's knowledge, infringe someone else's copyright or moral rights; or
- (b) if the Item contains material for which the Depositor does not own the copyright, the Depositor has:
  - (i) obtained all necessary permissions from the copyright owner/s to:
    - 1. include the material in the Item;
    - 2. provide the Item to the Repository; and
    - 3. grant to the Repository and End-Users the rights given under this Licence; and
  - (ii) clearly identified and acknowledged all third-party owned copyright materials within the text or content of the Item.
- (2) The Depositor warrants that the Item does not contain any defamatory, offensive or other unlawful matter and makes no improper invasion of the privacy of any person.
- (3) The Depositor warrants that neither the execution of this Licence nor the performance by the Depositor of its obligations under this Licence will cause the Depositor to be in breach of any agreement to which the Depositor is a party or is subject.
- (4) If the Item is based upon work that has been sponsored or funded by an agency or organisation other than the Repository, the Depositor represents that the Depositor has fulfilled any right of review or other obligation required of the Depositor under the contract or agreement with that agency or organisation.

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- (a) making the Item available in the digital repository for End-Users to:
  - (i) access and view the Item, and
  - (ii) make such additional uses of the Item as permitted under the terms of the End-User Agreement, if any, selected by the Depositor from the licence options set out in Clause 11(2);
- (b) modifying the Item as required for the technical operation or organisation of the digital repository; and
- (c) making and keeping copies of the Item for use by the Repository for security, back-up and preservation.

*Moral Rights*

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*Depositor's Rights*

- 6. (1) The Depositor reserves the right to use the Item and future versions of it in other ways, locations and media.
- (2) The Depositor may, from time to time, provide the Repository with updated versions of the Item and the Repository shall:
  - (a) include the updated version in the digital repository and,
  - (b) upon request by the Depositor:
    - (i) delete earlier version/s as specified; or
    - (ii) retain the earlier version/s as specified.
- (3) To avoid doubt, the parties acknowledge that by entering into this Licence and depositing the Item into the digital repository, the Depositor does not:
  - (a) assign copyright in the Item, in whole or in part, to the Repository; or
  - (b) subject to Clause 5(2), consent to any act or omission in relation to the Item which would otherwise infringe their moral rights.

*Repository's Warranties and Obligations*

- 7. (1) The Repository undertakes that it will not alter or deal with the Item except as permitted by this Licence.
- (2) The Repository agrees to clearly identify –
  - (a) the title of the Item;
  - (b) the author(s) of the Item; and
  - (c) where the Item has been published, citation details of the published version,
 in accordance with the details of the Item provided to the Repository by the Depositor.

*Repository's Limitation of Liability*

- 8. (1) The Repository is not responsible for any mistakes, omissions, or legal





infringements within the Item nor is it obliged to undertake legal action on the Depositor's behalf in respect of the Item.

(2) The Depositor agrees that if the Repository identifies the Item in the manner described in Clause 7(2), the Repository will be considered to have attributed the authorship of the author/s of the Item, in satisfaction of the author/s' moral right of attribution.

*Assignment of Depositor's Rights to a Third Party*

9. (1) The Depositor may assign all or any of the Depositor's rights in the Item under this Licence [ , subject to Clause 9(2) and 9(3)].
- [(2) Upon assignment of copyright in the Item to a third party, the Depositor must inform the Repository of the assignment and provide to the Repository detailed contact information to facilitate the Repository making contact with the assignee.]
- [(3) The Depositor agrees that in the event of assigning copyright in the Item to a third party, the Depositor shall use its best endeavours to secure from the third party assignee all necessary rights to enable the Depositor to continue the operation of this Licence on the basis of:
- (a) the Depositor being a licensee of the copyright owner in the Item; and
  - (b) with a view to continuing unaltered the operation of this Licence.]

*Termination*

10. (1) The Repository may at any time immediately and without notice terminate this Licence upon the occurrence of any of the following events:
- (a) where it is discovered that the Item contains or describes research that has been falsified or produced as a result of fraudulent or deceptive actions by any person;
  - (b) where it is discovered that the Item is not the Depositor's own work;
  - (c) where the Item infringes the legal rights of any third party;
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*Governing Law*

- 12. This Licence is governed by the law of the State of **[Insert: Name of State in which the Repository is located]**

**[OPTIONAL CLAUSE – Delete if not required]**

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**Execution**

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**ATTACHMENT 1**

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or  
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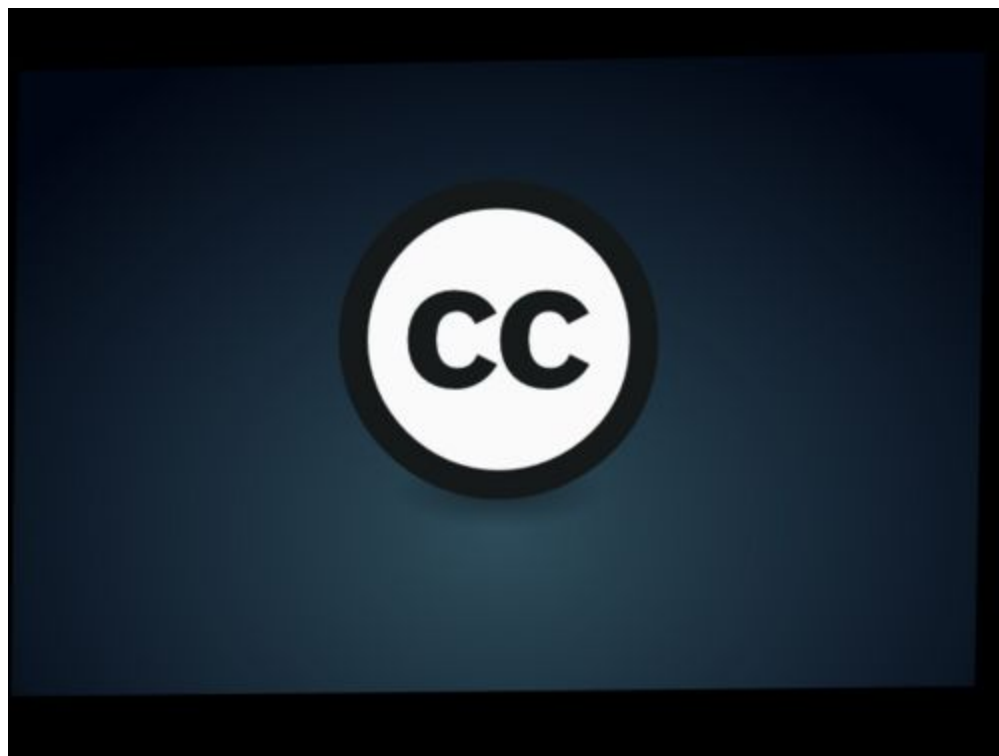
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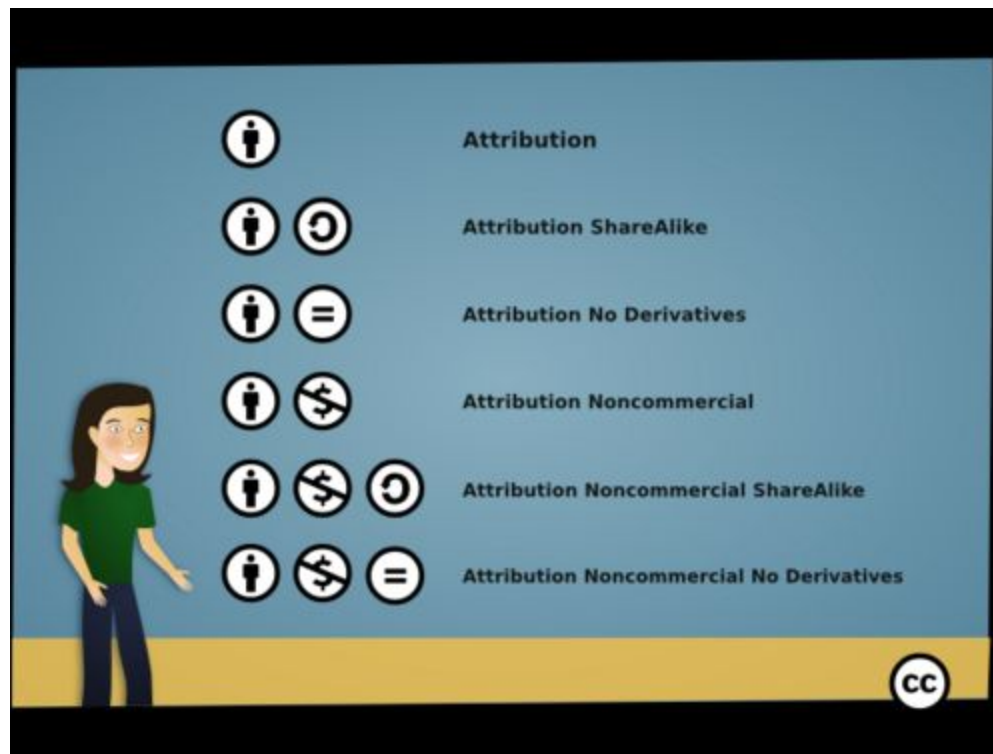








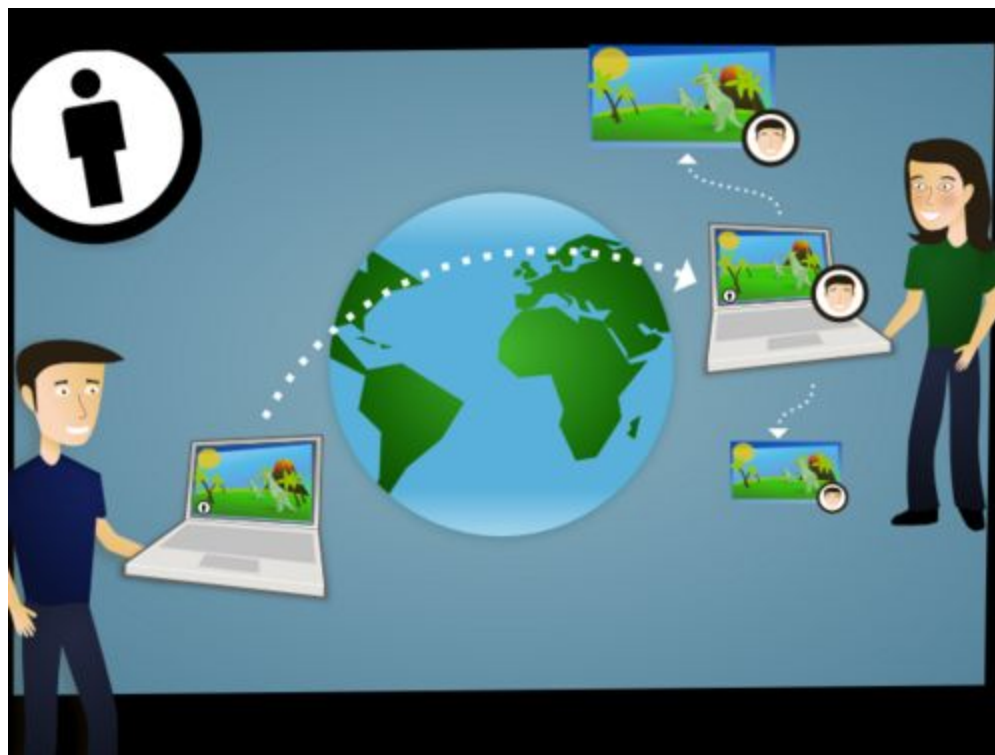




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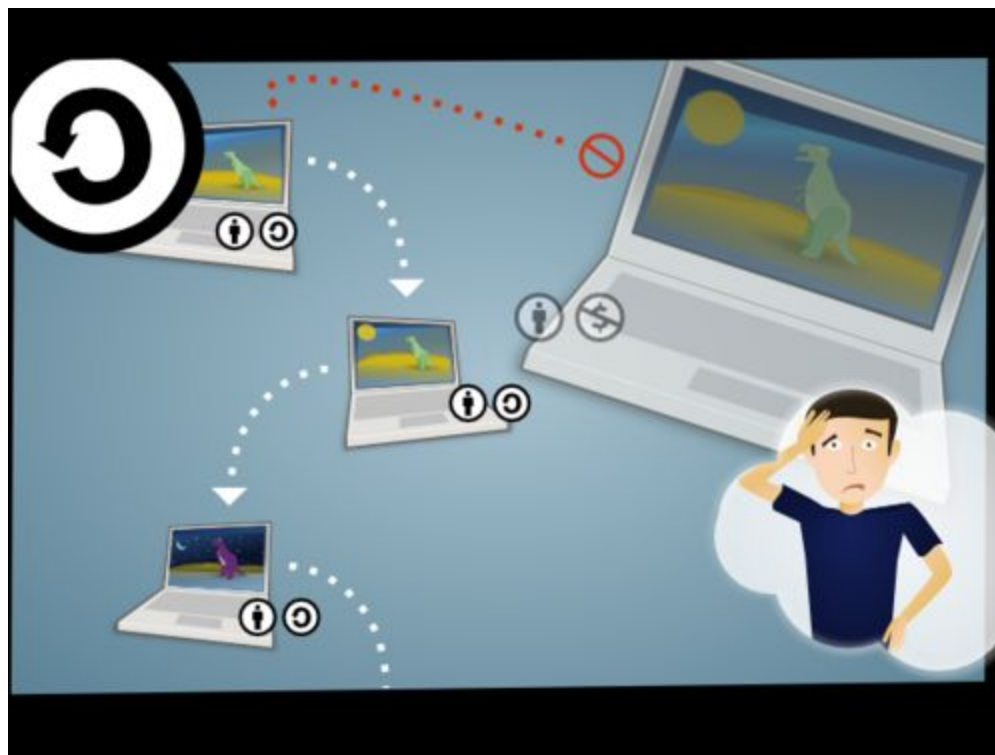
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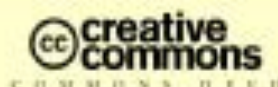






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# About the JISC Electronic Plagiarism Detection project

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The recommendations from the project include setting up a [Plagiarism Advisory Service](#) to act as a source of information for staff and institutions on issues such as writing an institutional policy, implementing procedures and how to set assignments that make plagiarism harder. This service may also provide services to students to assist in the development of their study skills and advise on how to avoid plagiarism. Further to this, it is recommended that the Advisory Service should run a national electronic plagiarism detection service, if implemented. JISC is also recommended to involve other organisations in setting up and running the service, in particular the Generic Centre of the LTSN.

## Background

Plagiarism has been around as long as formal education; however, there have been dramatic changes in society in the last five years that have affected the social environment in which students now learn. These changes have had positive and negative effects and include:

### Widening participation and the move to mass continued education

- Students now have a wider variety of skills and social backgrounds
- Some students may be less committed to a full learning experience and instead concentrate on achieving the final certificate
- Their subject selection may be based on the job market rather than aptitude or skill
- Class sizes have increased
- Increase in the number of mature students studying part-time

### Introduction of course fees and the elimination of grants

Спасибо!  
Вопросы?

Ирина Кучма

iryna.kuchma[at]eifl.net; [www.eifl.net](http://www.eifl.net)



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