

Tracking and tracing the scholarly record through metadata



► Quick about me



Danielle Padula, Scholastica

Head of Marketing & Community Dev

- Lead content strategy (product comms and industry education)
- Conduct market research
- Support product plans

► Contents



The scholarly
publishing
supply chain



Metadata as
trust signals



Expanding
quality
markers



Reporting
content
updates



► Beyond content

Supply chain management:

Publishers can increasingly monitor and record the movement of research objects throughout the peer review and publication process and report any updates made to the scholarly record.

► Metadata as trust signals

01

Are the authors of the work legitimate?



Author identities and affiliations: ORCID and ROR IDs

02

Who else was involved in the development of the manuscript?



Contributor Role Taxonomy (CRediT)

03

How was the work funded?



The Open Funder Registry (Funder IDs)

04

Was the work updated after publication?



Corrections and retractions (Crossmark + Retraction Watch)

Submission through distribution

Require key metadata in submission forms (validate as possible)

Review potential research integrity concerns

Register and distribute machine-readable metadata

1

Collect/verify

2

JATS XML and HTML
production

3

Content registration
(*archives & indexes*)



Review potential research integrity concerns: **Is this author legit?**



Trace the metadata

- Is the ORCID record complete?
- Does the ORCID record contain affiliation assertions?
- Does ORCID correspond to ROR ID?
- Is the geographical location of the individual consistent with the info on their record (free IP finder tools)?
- Do past institutional or funding affiliations raise COI flags?

▼ Employment (1)

⌵ Sort

Massachusetts Institute of
Technology: Cambridge, MA, US
Employment

Source: Massachusetts Institute of
Technology

★ Preferred source

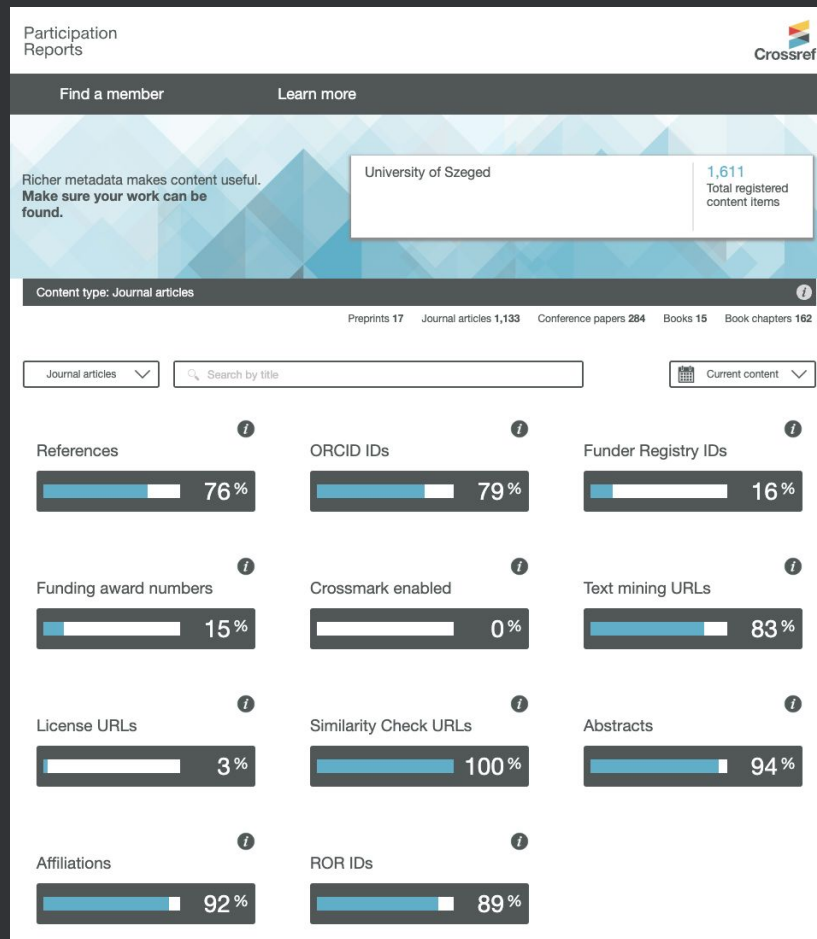


**Digital Object Identifiers (DOIs) create
a point of truth for content**

Expanding quality marker: start with DOIs

Crossref members can use Participation Reports to check their metadata quality and look for gaps.

Example: open citations and enrich references with DOIs to make it easier to trace sources and enable research linking



Be ready to report updates if needed

Reporting updates

Establish journal update policies in line with industry guidelines (COPE)

^ Publish a publicly available journal update policy page

Consider joining Crossmark so readers can check the status of articles

Regularly review appropriate use cases for article update types

1

Clear policies

2

Prompt review of
claims

3

Link updated
content to notices



CrossMark provides persistent update info (even for PDF download)

The image shows a PLOS ONE article titled "Utility of Corrected QT Interval in Orthostatic Intolerance" by Jung Bin Kim, Soomyoung Hong, Jin-Woo Park, Dong-Hyuk Cho, Ki-Jong Park, et al. The article is published in PLOS ONE, Volume 10, Issue 9, September 2, 2015. The article is available for free under a Creative Commons Attribution (CC BY) license.

Annotations highlight the following features:

- Check for updates:** A button in the article's header area that allows users to check for updates to the article.
- CrossMark logo:** A logo in the top right corner of the article page, indicating that the article is part of the CrossMark network.
- Updates available:** A notification box at the bottom of the page stating "Updates are available" and providing a link to view the updates: <https://doi.org/10.1371/journal.pone.0138198>.

The "Updates available" box also lists the following information:

- Utility of Corrected QT Interval in Orthostatic Intolerance
- Crossref DOI link: <https://doi.org/10.1371/journal.pone.0138198>
- Published: September 2, 2015
- Update policy: <https://doi.org/10.1371/journal.pone.0138198>
- Authors
- License Information

Thank you



Questions?
dpadula@scholasticahq.com