

# Getting started at Crossref

An introduction  
for new  
members



**Crossref**



@CrossrefOrg



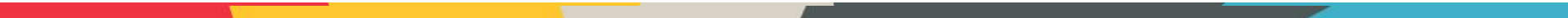
# Agenda

- Benefits and obligations of membership
- The role of metadata and persistent identifiers (DOIs)
- Ways to register your content
- Displaying DOIs and reference linking
- Updating and adding extra metadata
- Invoicing and billing
- Q&A

**Welcome!**

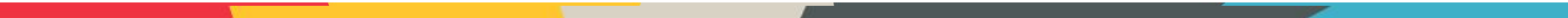


# Your membership journey

- Welcome email with prefix
  - Instructions for setting your user credentials
  - Billing cycle information
  - Voting process
  - Reports and support
- 

# Benefits and obligations

# Benefits of membership

- Connect content with a global network of online scholarly research
  - Create a persistent identifier for each object
  - Improve discoverability of publications through robust metadata
  - Find out who is citing your content
  - Participate in other collaborative services
  - Vote in board elections
- 

# Obligations of membership

- Deposit metadata and create DOI links
- Maintain and update your metadata and landing pages for the long term
- Follow the Crossref DOI display guidelines
- Undertake reference linking
- Pay invoices

# Metadata and persistent identifiers (DOIs)



# What content types can I register at Crossref?

Journals

Books

Book chapters

Conference proceedings

Datasets

Dissertations

Reports

Standards

Posted content (preprints)

Peer reviews

Grants

# What is metadata?



**Basic metadata:** titles; author names; ISSN/ISBNs, abstracts, references, DOI and URL of content location

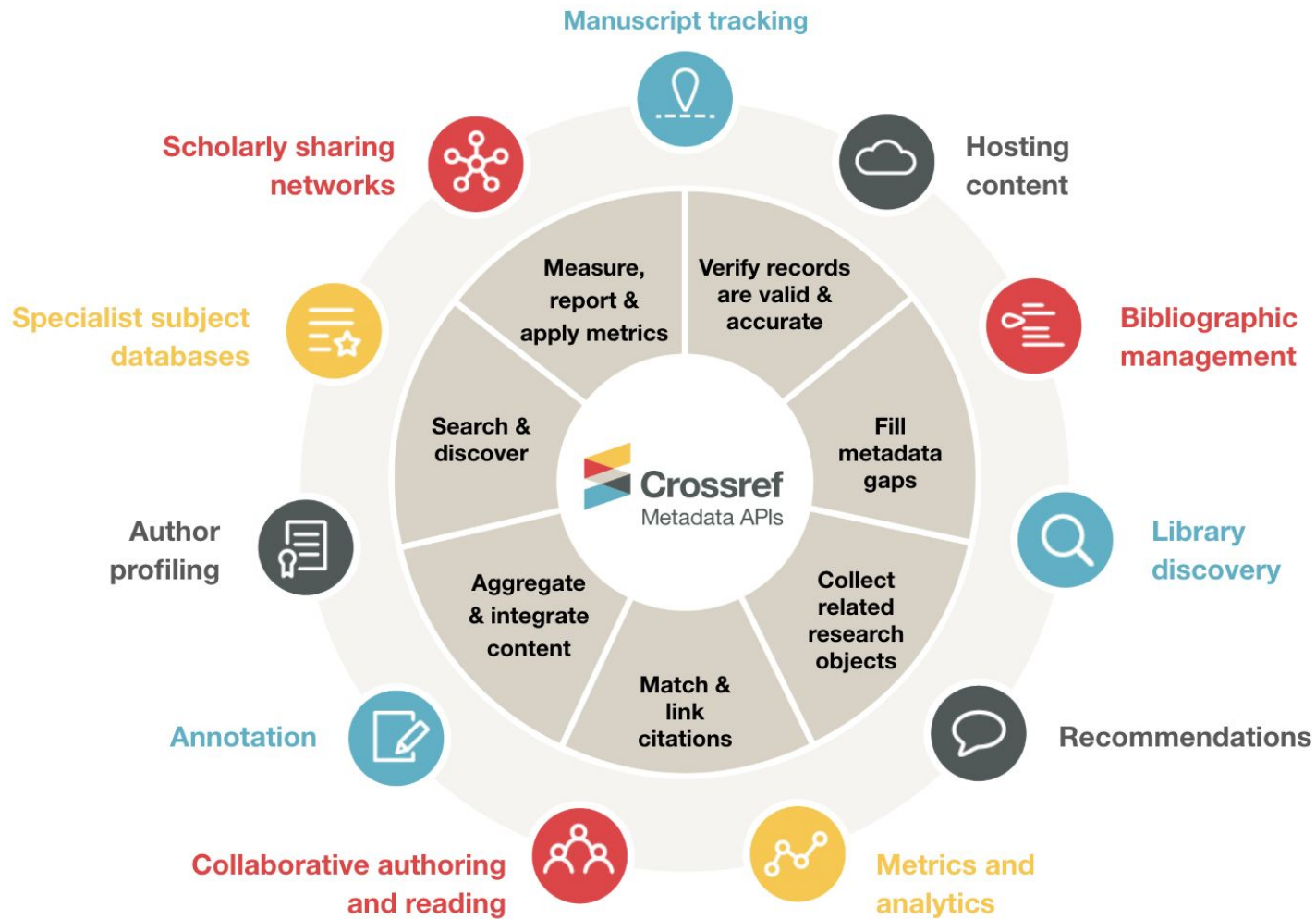
**Funding information:** Funder identifiers, award numbers

**Contributor/Affiliations:** ORCID, ROR

**License information:** License URLs,  
**Full-text URLs:** e.g. for text-mining and Similarity Check

**Crossmark:** updates, retractions, corrections  
ORCID iDs

**And more:** Peer Review reports, relationships, links to related data, Grant identifiers



# Metadata should be...

## METADATA PRINCIPLES

For metadata to support the community, it should be

**COMPATIBLE:** provide a guide to content for machines and people

*So, metadata must be as open, interoperable, parsable, machine actionable, human readable as possible.*

**COMPLETE:** reflect the content, components and relationships as published

*So, metadata must be as complete and comprehensive as possible.*

**CREDIBLE:** enable content discoverability and longevity

*So, metadata must be of clear provenance, trustworthy and accurate.*

**CURATED:** reflect updates and new element

*So, metadata must be maintained over time.*

# The structure of a DOI

<https://doi.org/10.1006/jmbi.1995.0238>

- The DOI directory: makes the DOI actionable on the web
- Prefix: assigned by Crossref
- Suffix: assigned by the member

Total DOI = routes through the DOI resolver to point to the registered URL

# DOI prefix

<https://doi.org/10.1006/jmbi.1995.0238>



- One prefix may be used for all content
- New titles may be added at any time
- No limit to the number of DOIs created, also no minimum number is required.

# DOI suffix

<https://doi.org/10.1006/jmbi.1995.0238>



- consistent
- simple
- short

# DOI display guidelines

<https://doi.org/10.13003/5jchdy>

- always be displayed as a full URL link in the form
- not be preceded by doi: or DOI:
- we recommend using the secure HTTPS rather than HTTP



# Your landing page

- A full bibliographic citation
- The DOI displayed as a URL
- A way to access full text
- If content is open access, the full text may be the landing page

The UKSG TRANSFER Project: collaboration to improve access to content

**Authors:** Ed Pentz , Louise Cole

## Abstract

The UKSG TRANSFER Code of Practice 2.0<sup>1</sup> was released in September 2008 with the goal of creating a set of voluntary industry best practices to ensure that journal transfers go smoothly and that users do not lose access to content when journals change ownership. Starting in April 2006, the UKSG TRANSFER Working Group undertook a lengthy process of analysing journal transfers and crafting a set of best practices to address the concerns of librarians, publishers, agents, societies and others. After much discussion and feedback, a concise, specific Code of Practice was developed. The Working Group decided to take a collaborative, positive approach with different stakeholders working together rather than focusing on prescriptive requirements with penalties attached which would have overly complicated the situation. The Code has seen good uptake and there are a number of ideas for how to take the work forward.

**DOI:** <https://doi.org/10.1629/22161>

**How to Cite:** Pentz, E. and Cole, L., 2009. The UKSG TRANSFER Project: collaboration to improve access to content. *Serials*, 22(2), pp.161–165. DOI:

<http://doi.org/10.1629/22161>

Published on 07 Jul 2009.  Peer Reviewed CC BY 3.0

## Downloads

 [PDF \(EN\)](#)

# Ways to register your content

# Ways to register content

- OJS Crossref plugin  
(<https://docs.pkp.sfu.ca/crossref-ojs-manual/en/config>)
- Manual web deposit form  
(<https://apps.crossref.org/webdeposit>)
- Upload XML file  
(<https://doi.crossref.org>)

# Open Journal Systems (OJS)

Versions 3.1.2 – 3.3.x

OJS utilizes two\* plugins for DOIs. One plugin assigns DOIs to publications within the system. The other plugin registers those DOIs with Crossref. Keep these functions in mind as we review.

**DOI Plugin //** Assigns DOIs to works within OJS/OMP/OPS.

**Crossref Export Plugin //** Registers DOIs and related metadata with Crossref.

# Enabling the OJS DOI plugin

- Under *Settings*, click: **Website > Plugins**
- Under *Installed Plugins*, scroll down to the section labelled *Public Identifier Plugins*.

The screenshot displays the OJS administration interface. On the left is a vertical sidebar menu with categories: Submissions, Issues, Announcements, Payments, Settings, Journal, Website (highlighted with a blue arrow), Workflow, Distribution, Users & Roles, Statistics, Articles, Editorial Activity, Users, and Reports. The main content area is titled 'Website Settings' and contains tabs for Appearance, Setup, Plugins (selected with a blue arrow), and Static Pages. Below these tabs are sub-tabs for Installed Plugins and Plugin Gallery. The 'Plugins' section is active, showing a list of installed plugins. The 'Metadata Plugins (1)' section contains one entry: 'Dublin Core 1.1 meta-data'. The 'Block Plugins (7)' section contains one entry: 'Browse Block'.

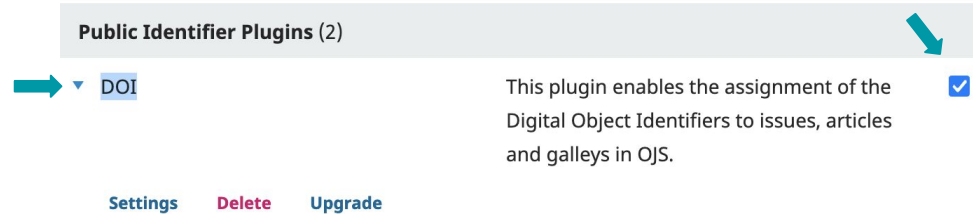
Metadata Plugins (1)	
▶ Dublin Core 1.1 meta-data	Contri schem

Block Plugins (7)	
▶ Browse Block	This p tools.

# Enabling the OJS DOI plugin

- Clicking the box to the right of the DOI Plugin description will enable it.
- Clicking the *arrow on the left* will expand your plugin options.
- After you've enabled the plugin, **click "Settings"** to configure DOIs in OJS.



Public Identifier Plugins (2)

→ DOI

This plugin enables the assignment of the Digital Object Identifiers to issues, articles and galleys in OJS.

Settings Delete Upgrade

# Configuring the OJS DOI plugin

- Choose the content for which you'd like to have DOIs assigned. *Articles only* is recommended.
- Enter the prefix assigned by Crossref.

## DOI

Please configure the DOI plugin to be able to manage and use DOIs in OJS:

### Journal Content

Please select the publishing objects that will have Digital Object Identifiers (DOI) assigned:

- Issues
- Articles
- Galleys

### DOI Prefix

The DOI Prefix is assigned by registration agencies (e.g. [Crossref](#)) and is in the format 10.xxxx (e.g. 10.1234):

DOI Prefix \*

x



# Configuring the OJS DOI plugin

- Choose your DOI suffix pattern.
- Default patterns *are recommended*.
- Please review [Crossref recommendations for DOI suffixes](#) before creating any custom suffix patterns.

## DOI Suffix

A DOI suffix can take any form, but must be unique among all publishing objects with the same DOI prefix assigned:

Use default patterns.

%j.v%vi%i for issues

%j.v%vi%i.%a for articles

%j.v%vi%i.%a.g%g for galleys.

Enter an individual DOI suffix for each published item. You'll find an additional DOI input field on each item's meta-data page.

Use the pattern entered below to generate DOI suffixes. Use %j for journal initials, %v for the volume number, %i for the issue number, %Y for the year, %a for the OJS article ID, %g for the OJS galley ID, %f for the OJS file ID, %p for the page number and %x for "Custom Identifier".

For example, vol%viss%ipp%p could create a DOI such as 10.1234/vol3iss2pp230

*for issues*

*for articles*

*for galleys*

# Enabling the OJS Crossref Plugin

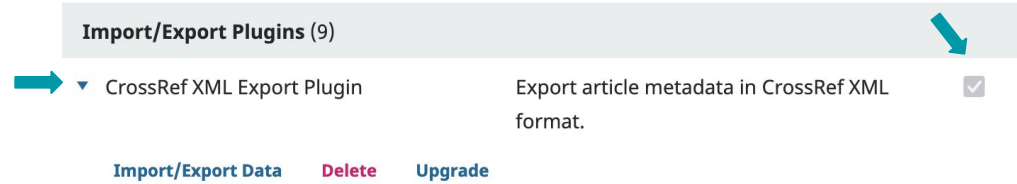
- Under *Settings*, click: **Website > Plugins**
- Under *Installed Plugins*, scroll down to the section labelled *Import/Export Plugins*.

The screenshot displays the OJS administration interface. On the left is a vertical sidebar menu with categories: Submissions, Issues, Announcements, Payments, Settings, Journal, Website (highlighted with a blue arrow), Workflow, Distribution, Users & Roles, Statistics, Articles, Editorial Activity, Users, and Reports. The main content area is titled 'Website Settings' and contains tabs for Appearance, Setup, Plugins (selected, with a blue arrow), and Static Pages. Below these are sub-tabs for Installed Plugins and Plugin Gallery. The 'Plugins' section is active, showing a list of installed plugins:

Plugins	
Name	Description
<b>Metadata Plugins (1)</b>	
▶ Dublin Core 1.1 meta-data	Contributor schema
<b>Authorization Plugins (0)</b>	
<b>Block Plugins (7)</b>	
▶ Browse Block	This plugin provides tools.

# Enabling the OJS Crossref Plugin

- Make sure the checkbox for the Crossref XML Export Plugin is checked.
- If it's greyed out, that's fine!



# Configuring the Crossref Plugin

- Fill out your depositor name and email (can be a technical contact).
- Fill out your username and password (your Crossref credentials) provided to you by Crossref with your membership confirmation.
- If you see a **401 error** on deposit, please review your credentials.

## CrossRef XML Export Plugin

### Settings

#### Plugin requirements not met

The plugin is not fully set up.

#### Plugin requirements not met

Articles are not selected for DOI assignment in the DOI public identifier plugin, so there is no deposit or export possibility in this plugin.

### DOI Plugin Settings

The following items are required for a successful CrossRef deposit.

Depositor name \*

Depositor email \*

If you would like to use this plugin to register Digital Object Identifiers (DOIs) directly with CrossRef you will need a username and password (available from [CrossRef](#)) in order to do so. If you do not have your own username and password you can still export into the CrossRef XML format, but you cannot register your DOIs with CrossRef from within OJS.

Username

Password

Please note that the password will be saved as plain text, i.e. not encrypted.

# Configuring the Crossref Plugin

- OJS can be configured to register DOIs automatically, on publication. Click this check box on the plugin settings to turn on automatic deposits.
- Unless you are *very certain* that you have a testing account with Crossref, **do not check the Crossref test API checkbox.**



OJS will deposit assigned DOIs automatically to CrossRef. Please note that this may take a short amount of time after publication to process (e.g. depending on your cronjob configuration). You can check for all unregistered DOIs.



Use the CrossRef test API (testing environment) for the DOI deposit. Please do not forget to remove this option for the production.

Save

Cancel

# Depositing via Crossref Plugin

- You can check on deposits by clicking on the "Articles" tab within the plugin.
- The plugin will report the registration/deposit status of your DOIs per article.
- **If you want to manually deposit or update metadata, check a box next to an article, scroll to the bottom, and click *deposit*.**

CrossRef XML Export Plugin

Settings Articles

Articles

Select	ID	Author; Title	Issue	DOI	Status
<input type="checkbox"/>	33257	Fyffe et al.: Age and tectonic significance of the Benton pluton, Eel River area, west-central New Brunswick, Canada	Vol. 59 (2023)	10.4138/atlgeo.2023.004	Not Deposited
<input type="checkbox"/>	33440	Atlantic Geoscience Editors; Geological Association of Canada-Newfoundland and Labrador Section Abstracts: Spring Technical Meeting, April 24 and 25, 2023	Vol. 59 (2023)	10.4138/atlgeo.2023.003	Not Deposited
<input type="checkbox"/>	33390	Editors; Atlantic Geoscience Society Abstracts: 49th Annual Colloquium and General Meeting, February 3 and 4, 2023	Vol. 59 (2023)	10.4138/atlgeo.2023.002	Not Deposited
<input type="checkbox"/>	33276	Fyffe et al.: An overview of Early Paleozoic arc systems in New Brunswick, Canada, and eastern Maine, USA	Vol. 59 (2023)	10.4138/atlgeo.2023.001	Active

# Additional OJS Crossref Plugins

- Content registration (DOI plugin)
- Reference linking and deposit
- Inclusion of funding data
- Support for Similarity Check (iThenticate) service;

<https://docs.pkp.sfu.ca/crossref-ojs-manual/en/>

<https://forum.pkp.sfu.ca/>

# Web Deposit Form



# Web deposit form

<https://apps.crossref.org/webDeposit/>

webDeposit Ver. 1.53

These forms allow you to enter metadata and register DOIs. Review the [help documentation](#) for details.

**Note: Your Crossref username and password will be required at the end of this process to submit data to the system. Please insure your browser allows JavaScript so that the data validation will function.**

Step 1: Select Data Type

Data Type Selection

Select Data Type:  Journal  Book  Conference Proceedings  Report  Dissertation  CrossMark Policy page  
 NLM File **BETA**  Supplemental-Metadata Upload **BETA**

Step 2: Identify the Journal

Journal information

Title

Abbr.

Journal DOI+

Journal URL

Print ISSN  Elect ISSN  Journal DOI and/or ISSN required

Volume  Issue

Issue DOI

Issue URL

**Publication dates**  
*note: use numerical values (YYYY, MM, DD)*

**Type: print**  
\*Year  Month:  Day:

**Type: online**  
\*Year  Month:  Day:

\* a minimum of one publication year is required

+ complete Title, Abbr., Journal DOI/URL and/or ISSN fields for title-level Journal deposit

# Web deposit form

Step 1: Select Data Type

Data Type Selection

Select Data Type:  Journal  Book  Conference Proceedings  Report  Dissertation  CrossMark Policy page  
 NLM File **BETA**  Supplemental-Metadata Upload **BETA**

<https://www.crossref.org/documentation/register-maintain-records/web-deposit-form/>

# Web deposit form

<https://apps.crossref.org/webDeposit/>

## Journal information

Title+

Abbr.+

Journal DOI+

Journal URL

Print ISSN+  Elect ISSN+  Journal DOI and/or ISSN required

Volume  Issue

Issue DOI

Issue URL

## Publication dates

*note: use numerical values (YYYY, MM, DD)*

### Type: print

\*Year  Month:  Day:

### Type: online

\*Year  Month:  Day:

\* a minimum of one publication year is required

+ complete Title, Abbr., Journal DOI/URL and/or ISSN fields for title-level Journal deposit

-----

# Web deposit form

<https://apps.crossref.org/webDeposit/>

webDeposit

Ver. 1.56

Enter the article's metadata and then continue with more articles or complete the deposit by selecting 'Finish'. Mandatory fields are marked by an "\*\*", but in general it is best practice to enter as much data as you can.

Step 3: Input the article metadata.

### Deposit Data

```
<journal_metadata>
<full_title>Test Test Test</full_title>
<abbrev_title>TTT</abbrev_title>
<doi_data>
  <doi>10.5555/tm34ej0</doi>
  <resource>https://www.crossref.org/blog</resource>
</doi_data>
</journal_metadata>
<journal_issue>
<publication_date media_type='online'>
```

### Article Information

Title\*

Original Title (for translated works only)

#### Contributors

Person	Role	First Name	Last Name	ORCID	
<input type="text" value="author"/>	<input type="text" value="author"/>	<input type="text" value="Dwight"/>	<input type="text" value="Testerson"/>	<input type="text" value=""/>	<input type="button" value="Add Contributor"/>
Organization (optional)	<input type="text" value="author"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add Organization"/>

Abstract Language  Abstract

DOI\*

URL\*

First page:  Last page:

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# Direct deposit of XML

Metadata deposit schema: for all content types

Resource-only schema: for adding most non-bibliographic metadata to existing records, like funder or license information or relationships

If interested in XML deposits or learning XML, our samples are a great starting point:

<https://www.crossref.org/xml-samples/>

```
<journal_metadata>
  <full_title>International Journal of
Meetings</full_title>
  <abbrev_title>Am J Meet</abbrev_title>
  <issn media_type='print'>4445-6767</issn>
</journal_metadata>
<journal_issue>
  <publication_date media_type='print'>
    <month>5</month>
    <day>5</day>
    <year>2001</year>
  </publication_date>
  <journal_volume>
    <volume>33</volume>
  </journal_volume>
  <issue>1</issue>
</journal_issue>
```

Journal title: International Journal of  
Meetings

ISSN: 4445-6767

Publication date: 5-5-2001

Volume: 33

Issue: 1

# Reference linking

A decorative footer at the bottom of the slide consists of four horizontal bars of different colors: red, yellow, light grey, and cyan, arranged from left to right.

# What is reference linking

Reference linking means including Crossref DOIs (displayed as URLs) when you create your citation list.

Soleimani N, Mohabati Mobarez A, Farhangi B. Cloning, expression and purification flagellar sheath adhesion of *Helicobacter pylori* in *Escherichia coli* host as a vaccination target. *Clin Exp Vaccine Res.* 2016 Jan;5(1):19-25.  
<https://doi.org/10.7774/cevr.2016.5.1.19>



# Requirements and best practice

- Required for all members for all current journal content
- Start reference linking within 18 months of joining
- Link references for backfile as well as current journal content
- Link references in non-journal content types such as books, and conference proceedings.
- Make sure the links in your references conform to our DOI display guidelines

# Querying for DOIs

- Use Crossref lookup tools (Simple Text Query)
- Third party tools such as OJS 3.1.2

# Using Simple Text Query

Enter text in the box below:

1. Boucher RC (2004) New concepts of the pathogenesis of cystic fibrosis lung disease. Eur Resp J 23: 146–158.
2. Knowles MR, Boucher RC (2002) Mucus clearance as a primary innate defense mechanism for mammalian airways. J Clin Investig 109: 571–577.
3. Antunes MB, Cohen NA (2007) Mucociliary clearance - a critical upper airway host defense mechanism and methods of assessment. Curr Opin Allergy Clin Immunol 7: 5–10.
4. Riordan JR, Rommens JM, Kerem BS, Alon N, Rozmahel R, et al. (1989) Identification of the Cystic-Fibrosis Gene - Cloning and Characterization of Complementary-Dna. Science 245: 1066–1
5. Rommens JM, Iannuzzi MC, Kerem BS, Drumm ML, Melmer G, et al. (1989) Identification of the Cystic-Fibrosis Gene - Chromosome Walking and Jumping. Science 245: 1059–1065.
6. Bobadilla JL, Macek M, Fine JP, Farrell PM (2002) Cystic fibrosis: A worldwide analysis of CFTR mutations - Correlation with incidence data and application to screening. Human Mutation 19: 5
7. Qu BH, Thomas PJ (1996) Alteration of the cystic fibrosis transmembrane conductance regulator folding pathway - Effects of the Delta F508 mutation on the thermodynamic stability and folding

Include PubMed IDs in results.

1. Boucher RC (2004) New concepts of the pathogenesis of cystic fibrosis lung disease. Eur Resp J 23: 146-158.

<https://doi.org/10.1183/09031936.03.00057003>

2. Knowles MR, Boucher RC (2002) Mucus clearance as a primary innate defense mechanism for mammalian airways. J Clin Investig 109: 571-577.

<https://doi.org/10.1172/JCI0215217>

3. Antunes MB, Cohen NA (2007) Mucociliary clearance - a critical upper airway host defense mechanism and methods of assessment. Curr Opin Allergy Clin Immunol 7: 5-10.

<https://doi.org/10.1097/ACI.0b013e3280114eef>

Email Address:

Parent DOI:

Username:

Password:

If you use **role credentials**, your username is your role.

If you use **personal credentials**, your username is your email address followed by your role; e.g. jdoe@server.com/myrole

<https://apps.crossref.org/simpleTextQuery>

# Using the OJS plugin

1. Enable references as a submission metadata field
  - Workflow Settings > Submission > Metadata
  - References > Enable references metadata
2. Enable the Crossref reference linking plugin. You can find it in the plugin gallery by clicking on:
  - Settings > plugins > plugin gallery
  - Click the appropriate checkbox to enable.

<https://docs.pkp.sfu.ca/crossref-ojs-manual/en/references>

# Updating and adding extra metadata

# Maintaining your metadata

- Clean: identify and correct any errors.
- Complete: add information for additional fields, and don't forget to do this for your backfiles too.
- Up-to-date: metadata may change over time, such as when a URL is updated, so make sure your metadata is updated with these changes.

# Metadata maintenance

- Deposit additional metadata including: references, ORCID iDs, funding data, licence information, abstracts
- URL updates
- Make corrections or provide missing data
- Add metadata for your backfiles
- Know what's required, recommended, and optional - <https://www.crossref.org/documentation/schema-library/required-recommended-elements/>

Check that the quality of your metadata is good - don't just focus on quantity

# Common Errors

- Missing or incorrectly spelled author names
- Out of date metadata
  - URL changes which mean the DOI no longer works
  - Missing publication dates
  - Updates made in OJS but not sent to Crossref
- Incorrect ORCID iDs
- Titles which don't match
- Spelling mistakes
- Incorrect page numbers



# Correcting your metadata

- Update record in OJS and redeposit
- Redeposit via the Web Deposit Form
- Resubmit metadata via XML - overwriting the old record with new information
- For bulk URL-only changes you can send a .csv file to our support team

\*There is never a fee to update metadata

# Invoicing

A decorative footer at the bottom of the slide consisting of four overlapping geometric shapes: a red trapezoid on the left, a yellow trapezoid in the middle, a light beige trapezoid on the right, and a cyan trapezoid on the far right.

# Invoicing and payment

- Annual member fee invoice sent each January
- Content registration invoices sent quarterly (January, April, July, October)
  - Prefix
  - Month the content was registered
  - Content type
  - Whether the content is current (CY) or backfile (BY).
- We accept credit card payments, bank transfers, and checks

**In Conclusion...**



# Thank-you

- Documentation: <https://www.crossref.org/documentation/>
- Email [support@crossref.org](mailto:support@crossref.org)
- Community Forum: <https://community.crossref.org>
- PKP: <https://forum.pkp.sfu.ca/>
- <https://docs.pkp.sfu.ca/crossref-ojs-manual/en/>



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