USER MANUAL

BASIC FUNCTIONALITY

CREATE ACCOUNT/LOGIN

1. **CREATE** a new account by clicking on **SIGN IN** and providing the necessary information. All fields are mandatory.
2. Shortly after creating your account, you will receive an e-mail containing an activation link. Click on this link to **ACTIVATE** your account.
3. After your account is activated, you can **LOGIN** using the username and password you provided during the registration.

RUNNING A COMPLIANCY TEST

1. To add a new compliancy test click on **TEST COMPLIANCY > RUN COMPLIANCY TESTS**.
2. Choose the **BASE URL** of your repository/journal from the list, or, if you cannot find it there, enter it manually in the field below.
3. Select the set of rules you want to test your repository/journal against (OpenAIRE, Driver, All Rules).
4. Each rule set contains various Content and Usage rules. You can determine exactly which rules to use by clicking on **SHOW RULES**.
5. If you choose at least one Content rule you will have to determine the **MAXIMUM NUMBER** of records that will be tested. If your repository/journal has fewer records than this number, then all the records present at your repository will be validated. You can also input '*all*' to have all the records tested.
6. Choose the **SET OF RECORDS** from where records will be chosen for validation (e.g. from the driver set, or the ec_fundedresources set).
7. By clicking the submit button your tests will be added for execution. You will be redirected to the **BROWSE TEST RESULTS** page. To learn more about this page refer to the appropriate section of this manual.
8. You may leave this page at any time. The execution will continue uninterrupted and you will receive a **NOTIFICATION E-MAIL** upon its completion.

BROWSING TEST RESULTS

1. You can browse all the tests you have submitted by clicking on **TEST COMPLIANCY > BROWSE TEST RESULTS**.
2. You will be presented with a table containing information about each test. More specifically:

a. **TYPE**: The type of the test.
b. **STATUS**: There are 3 possible values 1) **PENDING**, which means that your test has been added in the execution queue but its execution has not started yet 2) **WORKING**, which means that your test is being executed 3) **FINISHED**, which means that your test has finished executing and the complete results are ready.
c. **SCORE**: The score the tested repository/journal has achieved. Higher scores indicated better compliance with the validation rules. The score range is from 0 to 100. Zero (0) means that all validation rules have failed, and 100 means that all rules have succeeded. All intermediate score values mean that some errors have occurred.
d. **STARTED**: The time the test was submitted.
e. **DURATION**: The time the test needed to finish executing.
f. **REPOSITORY**: The repository/journal that was tested.
g. **RULE SET**: The set of rules used for the test. This might be a pre-defined rule set or custom, if you have manually chosen the rules that were applied.
h. **REPORTS**: Click on this link to get a comprehensive report of the test and its results.

VIEWING A TEST SUMMARY

1. You can view the summary of a test by clicking on **TEST COMPLIANCY > BROWSE TEST RESULTS**, finding the entry for the tests you are looking for and clicking on **SHOW RESULTS**.
2. In the summary page you are presented with two tables. The first one provides the same information as that on Browse Test Results page. The second table provides information about the **RULES** that were applied during the test.
3. In the second table you can find all the rules that were applied, along with information about the records that failed to comply with a specific rule. More specifically:
   a. **RULE**: The name of the rule
   b. **DESCRIPTION**: A detailed description of the rule
   c. **SUCCESSFULLY VALIDATED OUT OF TOTAL RECORDS**: How many records were successfully tested with the current rule. The result is shown as x/y where x is the number of successfully validated records and y is the number of total records that were tested.
   d. **SUCCESS**: If a record didn't successfully validate, a **LINK** will be shown in this box. By clicking on it, you will be presented with the **OAI-DC XML** representation of the record, so you can find out the problem that caused the unsuccessful test.

ADDING A REPOSITORY/JOURNAL IN OPENAIRE

1. After you are certain that your repository/journal validates successfully, you can proceed with **ADDING** it in OpenAIRE. To start this process, click on **JOIN OPENAIRE**

> **ADD NEW REPOSITORY** or **ADD NEW JOURNAL**. Select your repository from the list and fill in the join form. If you are adding a journal, you are automatically redirected to the form. The rest of the registration process is the same for both cases.

2. In the join form, you must fill in some information for your repository/journal. More specifically:

   a. **TYPOLOGIES**: The typology used by your repository/journal. If you use a typology not found in the drop-down list, you can enter a custom name in the field below.

   b. **OFFICIAL NAME**: Your repository's/journal's official name

   c. **ENGLISH NAME**: Your repository's/journal's name in English

   d. **ICON URL**: A link to an image file containing your repository's/journal's logo

   e. **COUNTRY**: The country where your repository/journal is located

   f. **LONGTITUDE**/**LATITUDE**: The (approximate) coordinates of your repository's/journal's location

   g. **TIMEZONE**: The timezone of the area where your repository/journal is located

   h. **ENTRY URL**: The main page of your repository's/journal's website

   i. **ACCESS PROTOCOL**: Pre-set to OAI-PMH

   j. **BASE URL**: The url that handles the external OAI-PMH requests for the repository/journal. If you are not sure about the base URL of the repository/journal you want to add, please contact the repository's/journal's administrator.

   k. **EXPOSED FORMATS**: A (non-exhaustive) comma-separated list of the available metadata formats, e.g. oai_dc, didl. Only oai_dc is necessary to be provided.

   l. **EXPOSED SETS**: A (non-exhaustive) comma-separated list of the available sets, e.g. driver, ec_funcedresources.

3. The add request will be put on hold until a full compliancy test of the repository/journal has finished. When this happens you will be notified via email.

4. If the compliancy test is successful, a confirmation link will be sent to the repository's/journal's administrator. When the administrator clicks on this link the repository/journal will be added in the OpenAIRE compliant list.

AVAILABLE COMPLIANCY TEST TYPES

OAI CONTENT VALIDATION

Tests of the type **OAI CONTENT VALIDATION** include rules that will be applied to the repository's/journal's **RECORDS**. For example, one such rule might be to check if a dc:identifier field is present in the record being checked.

When adding a compliancy test of this type the options you must specify are the following:

1. **BASE URL**: The base URL of the repository/journal on which you want to run this test.
2. **NUMBER OF RECORDS**: The number of records that will be harvested. The rules specified will be applied on these records.
3. **RANDOM SELECTION**: If selected, then the records will be retrieved randomly from the ones available in the specified set.
4. **SET**: If you want to validate the records of a specific set in the repository/journal, you must provide the set's name. This field is ***optional***.
5. **CHOOSE A RULE SET**: Here you can find the pre-defined sets of rules that you can choose.
6. **MANUALLY CHOOSE THE RULES TO APPLY**: If you don't wish to use a pre-defined set of rules, you can manually choose the rules that will be applied on the harvested records.

OAI USAGE VALDIATION

Tests of the type **OAI USAGE VALIDATION** include rules that check the correct implementation of the OAI-PMH protocol. For example, one such rule might be to check if the repository responds correctly to incremental delivery requests (using from/until in ListIdentifiers and ListRecords requests).

When adding a test of this type the options you must specify are the following:

1. **BASE URL**: The base URL of the repository/journal on which you want to run this validation.
2. **CHOOSE A RULE SET**: Here you can find the pre-defined sets of rules that you can choose.
3. **MANUALLY CHOOSE THE RULES TO APPLY**: If you don't wish to use a pre-defined set of rules, you can manually choose the rules that will be applied on the harvested records.