

# CASRAI

The Business Agreements  
Behind Technology Interoperability

# CASRAI

Consortia Advancing Standards in Research Administration Informat

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## Before The Business Agreements Behind Technology Interoperability

<http://casrai.org/node/3>

# Agenda

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## CASRAI Foundations

- What is Research Information?  
Users, Requirements, Pain-points

## CASRAI Approach

- Glossary Terms
- Document Templates
- CASRAI & euroCRIS

## CASRAI in the UK

- Background
- Priorities in 2017

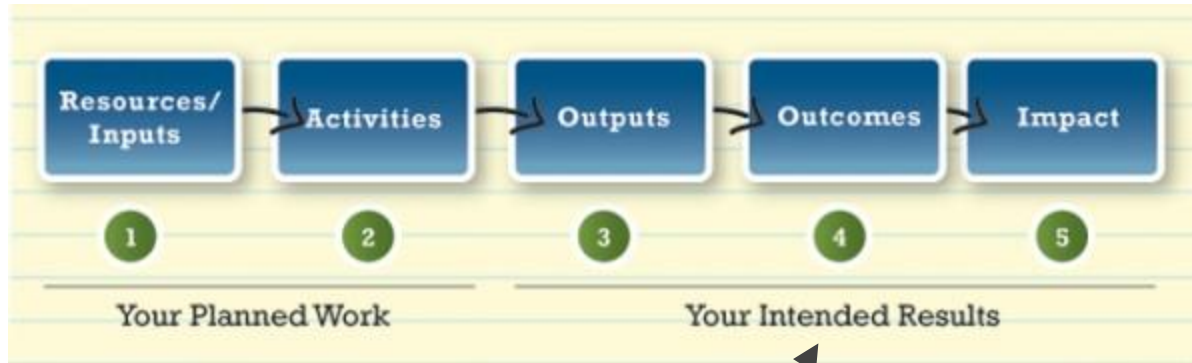
## CASRAI in Europe

- Status & Next Steps



# What is Research Information?

# The Research Lifecycle is like a Logic Model



*Caveat: Research is messier (on purpose); less linear; results are not always intended (that's the whole point) - but you get the idea*

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# Research Information is the record of it all

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All the information created by all users during the entire research lifecycle - past and present.

Information about:

**Inputs** > People, Orgs, Funding, Equipment, Infrastructure

**Activities** > Projects/studies, Collaborations, Citations

**Outputs** > Publications, *Datasets*, Artworks, New Companies, etc

**Outcomes/Impacts** > Case Studies, Indicators

Other common names in the research information area:

Metadata, research-administration-information, current-research information-systems (CRIS), research-information-management (RIM), repositories, scholarly-communications - and many more

Users,  
Requirements,  
Pain-points

# Who are the USERS? Who are the AGENTS?

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Information Users: the people who **know** about the information they can **provide** and the information they **require** throughout the research logic model:

Researchers, students, research admins, librarians, finance officers, funding program officers, stakeholder executives

Information Agents: the **software systems** (and the various **technologists** who manage them) that 'store/secure/process/display' the information **for the Users**:

Database managers, modellers, programmers, software integrators



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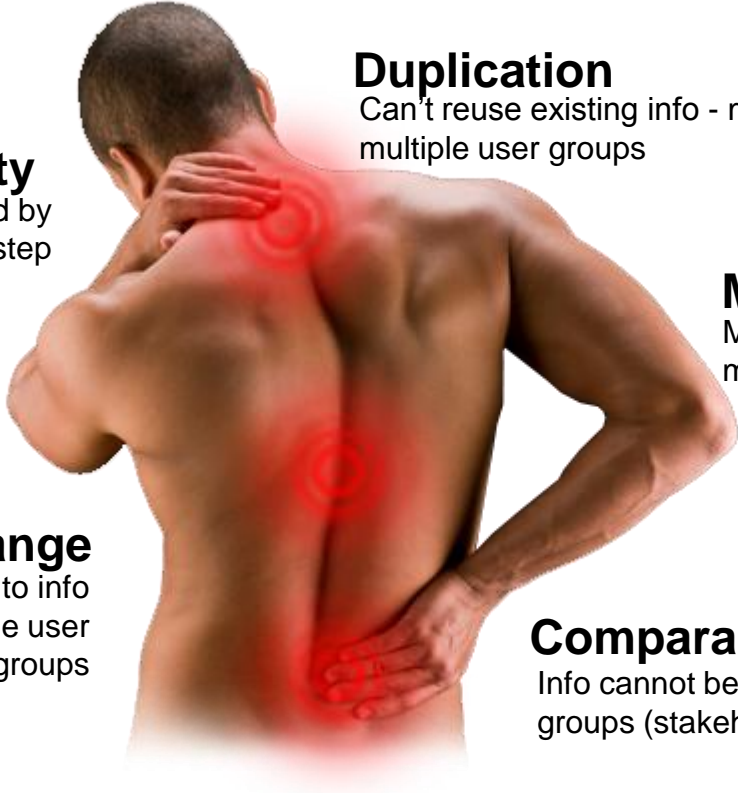
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## **Complexity**

Granularity higher than warranted by business step

## **Feasibility**

Info clearly useful but very hard to collect

## **Change**

Too frequent changes to info needs + across multiple user groups

## **Duplication**

Can't reuse existing info - must re-key + across multiple user groups

## **Maturity**

Meaning/relevance of info needs more shared analysis

## **Comparability**

Info cannot be compared across key users groups (stakeholders)

Information Pain-Points - it only hurts when we share

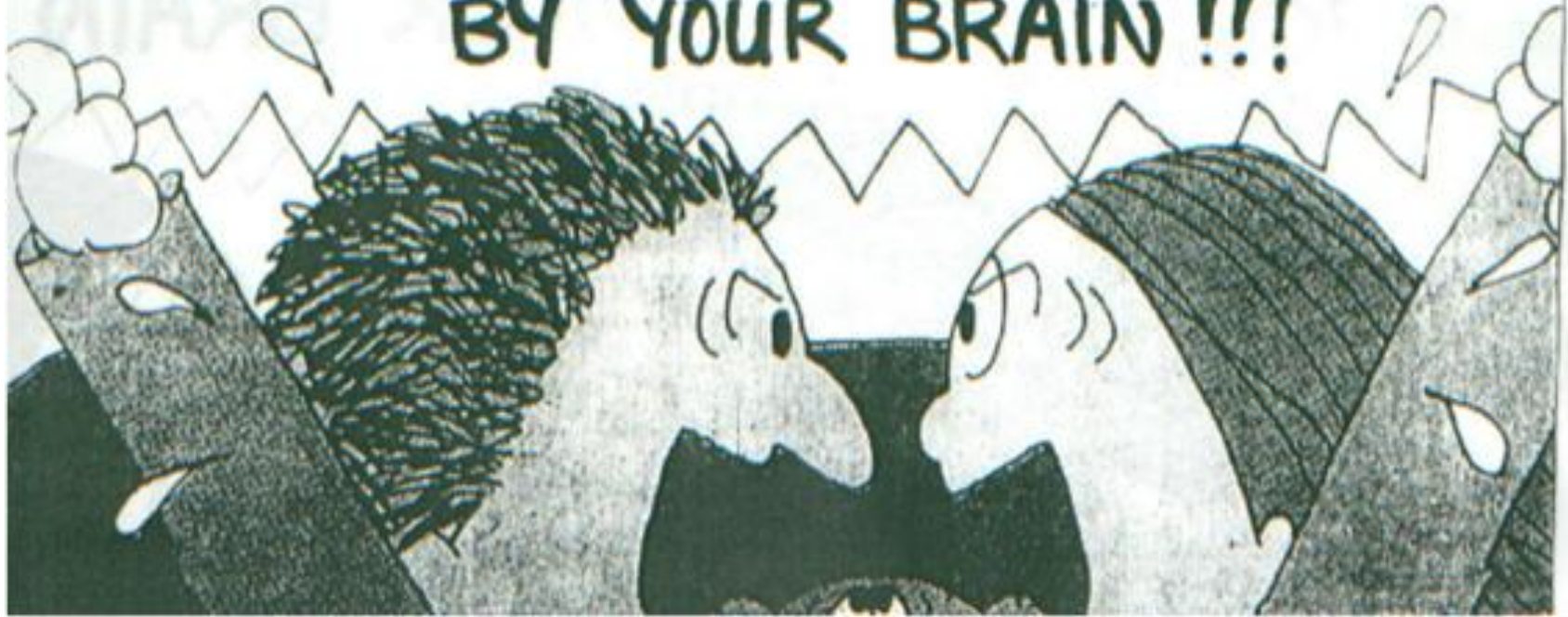
# Summing up

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CASRAI aims to increase the quality, availability and impact of research information without forever increasing the burden of data capture/collection

We - as stakeholders - need to understand each other and define the scope/use cases for information exchange clearly AT the business level first BEFORE worrying about the technology

MY WORDS CAME OUT FINE!  
THEY WERE PROCESSED INCORRECTLY  
BY YOUR BRAIN !!!



CASRAI is an open  
community of  
Users agreeing  
common  
requirements -  
together

# What are research information (USER) requirements?

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Non-technical outlines of what information is needed by any given user at any given point in the research lifecycle. These outlines (or specifications) must include:

- 1) **Glossary** of terms and definitions
- 2) Document Templates including **data elements** needed, eg:
  - Principal Investigator/Last Name
  - Project/Start Date
  - Manuscript/Co-authors
- 3) **Rules** (or filters) for what to include and what to exclude, eg:
  - No more than 2 years of work history information
  - Expenditures greater than \$100.00 only

# CASRAI & euroCRIS

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CASRAI produces the business requirements

Openly available for all to use free of charge from the  
CASRAI dictionary

(New) CERIF-XML profile is well suited to represent  
those requirements in a standard data exchange  
format

Openly available for all to use free of charge from **euroCRIS**



# CASRAI Annual Process

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1. Steering Committees (SC) develop draft priorities
2. Open Call is issued to gather feedback & new ideas from wider community
3. SCs compile results and create a set of integrated Working Groups (WG)
4. WGs (Users) start Agreement Sprints (4-6 months) including open review & final publication
5. Online & in-person conferences to promote and learn about the new standard agreements



# Examples

# Take a look at the dictionary

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## Report formats

<http://dictionary.casrai.org/CV - Full Academic>

<http://dictionary.casrai.org/Open Access APC Report>

<http://dictionary.casrai.org/Research Dataset/Ethics Compliance>

## Glossaries

<http://dictionary.casrai.org/Category:Research Data Domain>

## Picklists

<http://dictionary.casrai.org/Contributor Roles>

# CASRAI-UK

# First chapter outside of Canada

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Jisc sponsored pilot 2013-2015

Open Access Reporting

Organisational Identifiers

Data Management Plans

Raised profile in UK

HEIs, Funders, others working collaboratively

Learnt from this

Need clear scope & Need clear process

# CASRAI-UK

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First meeting held 16th May 2016  
>50 universities, funders & suppliers

Blog post @

<http://symplectic.co.uk/events-conferences/hosted-casrai-uk-chapter-meeting/>

More details incl current members @

[http://ref.casrai.org/United\\_Kingdom\\_Chapter](http://ref.casrai.org/United_Kingdom_Chapter)



# Open Call 2017

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Issued on behalf of Canadian and UK Chapters

<http://casrai.org/opencall17>

Had over 80 endorsements - these now being reviewed in order to agree work plan for 2017

- Reporting outcomes to funders partic to Researchfish
  - **PILOT looking only at publications with DOIs or PubMedIDs**
- OA reporting harmonisation
- Career levels - clear definitions

# Get involved

# Multiple levels of engagement

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- Universities can join as members and sit on steering group
- Funders and Suppliers can join as partners
- Members and partners can propose work, and be involved in working groups
- Review of work is open to anyone, whether a member or not
- Products are freely available for anyone to use





# A European Chapter of CASRAI

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- In the Open Call, expressions of interest for a chapter in Europe
- **Seeking Universities:** Research Offices, Research Libraries, IT Teams, Institutional Planning Units
- **Seeking Partners:** Vendors, Publishers/Journals, Funders
- Interested? Email us at [europe@casrai.org](mailto:europe@casrai.org)



# Thank you

We hope you will get involved

[www.casrai.org](http://www.casrai.org)

‘More research, less  
paperwork, better  
information’

[info@casrai.org](mailto:info@casrai.org)

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