

**Mendeley Data Integration** 

Released: 5.8.0 / 4.27.0

The Datasets content type was introduced into Pure in 4.17, and prior to that Datasets could be captured in Pure as Research Outputs.

In response to our customers' increased focus on Research Data Management and the tools required to support it, in this release we have implemented integration between Mendeley Data and Pure.

Enabling the Mendeley Data integration in Pure requires the Pure Import module and a subscription to Mendeley Data Institutional Edition.

# Mendeley Data description

Mendeley Data is a cloud-based research data repository, with specific research data management capabilities:

- Version management, including comparison between versions
- Automatic archiving of Datasets into DANS archive (in perpetuity)
- Preview and visualise files in browser, including spreadsheets and 3D images
- Integration with Hivebench ELN for full lifecycle management

# Key features of the Mendeley Data integration

The integration between Pure and Mendeley Data capitalises on the individual strengths of each tool, offering a holistic solution that meets the needs of both researchers and institutions.

- Automatically synchronises Datasets created by your researchers in Mendeley Data
- Keeps synchronised Dataset content in Pure up-to-date as it is edited in Mendeley Data
- Only metadata is imported into Pure; files are represented as links in Pure with the golden copy retained in Mendeley Data
- Harnesses the individual strengths of Mendeley Data as a cloud-based research data repository, and Pure as an institutional tool to capture relationships between content, to showcase institutional research activity, and to monitor compliance with funder mandates and institutional policies
- Requires Pure Import module and a subscription to Mendeley Data Institutional Edition

## **Enabling synchronisation with Mendeley Data**

### 1. Set up Mendeley Data Integration

a. Set the default Publisher

It is recommended to set a default Publisher in order to achieve the best experience with respect to seamless integration. This is done by: Go to Administrator > Datasets > Configuration:

Configuration	
Disable datasets	
Default publisher	
Default publisher Elsevier Publisher	
11m	

b. Enable Datasets workflow

It is recommended that workflow for Datasets is enabled when synchronising Datasets content from Mendeley Data, thereby enabling you to set a default workflow step upon import for content sourced from Mendeley Data. If workflow is not enabled, all content will be immediately visible on the Portal (where you display Dataset content on your Portal).

Go to Administrator > Datasets > Workflow status configuration:

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#### c. Configure the integration

By default, Mendeley Data integration is disabled. To enable the integration, go to Administrator > Datasets > Mendeley Data:



- i. Turn on Mendeley Data integration
- ii. Insert your institution's Mendeley institution ID in the "Institution ID" field1
- Select the default Managing Organisation. This is as a mandatory field for any dataset and the selection determines which role is being notified when new candidates are created (as such, it is recommended that the Managing Organisation selected is the Institution)
- iv. Choose the desired default workflow step
- v. Save the configuration

The synchronisation job will now start.

<sup>1</sup> You can find your Mendeley institution ID by following the link provided underneath the input field.

Once the integration is enabled, the 'Mendeley Data: Synchronise Datasets' job is enabled automatically, set to run once per week. You can edit the frequency of this job, or run it manually, from the Job screen, where you can also review the import log.

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## How does the Mendeley Data synchronisation work?

**Matching Persons and Organisational units** 

## a. Person IDs used by the Mendeley Data integration

The Mendeley Data integration uses four different Person IDs to make a Person match:

i. Mendeley profile ID



During the first matching process (described below), the Mendeley profile ID will be populated, such that any subsequent synchronisations will automatically import.

#### ii. Scopus author ID

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Employee ID	
Employee ID	
Scopus author ID	
Researcher ID	Cancel Create
HESA staff ID	
Digital author ID	
Researchmap researcher ID	
Mendeley profile ID	

Scopus author IDs can be sourced in bulk using the "Scopus Author ID Import Job".

### iii. ORCID

ID	
12345 Employee ID	Edit + -
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ORCID	
🕑 0000-0002-1694-233X	Edit 😑

## iv. Mendeley profile URL



During the first matching process (described below), the Mendeley profile URL will be populated.

In order for a Dataset to be matched, there must be a match of at least one of these four IDs between Mendeley Data and Pure.

b. Organisational unit IDs used by the Mendeley Data integration

The Mendeley Data integration uses one Organisational unit Source ID to make an Organisational unit match:

i. Mendeley institution ID

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During the first matching process (described below), the Mendeley institution ID will be populated, such that any subsequent synchronisations will automatically import.

## c. Person & organisation matching

When Pure sources Dataset content from Mendeley Data, it checks for Person and Organisational unit matches. Any Dataset from Mendeley Data attributed to a Person and Organisational unit in Pure (as per the matching exercise described above) is automatically imported into Pure, assigned to the default workflow step selected, and is visible to both the Personal User and relevant Dataset Editor(s)/Administrator(s) for further data input (e.g. relations) and/or validation.

If Pure is unable to attribute the Mendeley Data Dataset to a Person or Organisational unit in Pure (as per the matching exercise described above), the Dataset is brought into Pure as an 'import candidate' that the Administrator of datasets must process.

#### Processing 'import candidates'

Following each completion of the 'Mendeley Data: Synchronise Datasets' job, any Datasets from Mendeley Data that Pure was unable to attribute to a Person or Organisational unit (as per the matching process described above), will be visible to the Administrator of datasets as 'Mendeley dataset candidates'. There will be an editorial task notification indicating how many datasets require processing:



Clicking on these candidates will navigate the user to a tabular view of the Datasets editable list, where all unmatched Mendeley Data Datasets are listed in the "Import candidates" column. This screen also provides information about when the last synchronisation took place, and when the next one is scheduled.

2	Pure	Athena Univ	ersity				٩	1 atira -	🕫 Switch user 🗸	Log out 🕥
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	The Pur	e University			<b>S1</b>					-
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After clicking on the import candidates available, an "Import candidates" window will open, where each candidate can be processed.

Import candidates from Mendeley Data for all	organisa	tional	uni	ts		
List of import candidates from Mendeley Data not currently in Pure. The dat the author(s) and / or the organisational unit have changed in Mendeley Da continue to appear on the import candidates list until this is done. You can import candidates or updated candidates	tasets with the ata. It is import limit the resul	label Up ant to im t list usin	dated port tl ig the	denotes d he update drop dow	datasets already i ed datasets, as th n above to show	n Pure, where ese will either all, new
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Maps of chemical segregation, recovery, recrystallisation and steel Bernard Ennis, 2016 DOI. Found: Jan 12 2017 9:31 AM Import Source data   DOI	d phase tra	nsform	ation	in a TR	lIP-assisted d	lual phase Reject
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Banding and work-hardening data Bernard Ennis, 2016 DOI. Found: Jan 12 2017 9:31 AM Import Source data   DOI						Reject
Direct simulation of hot jet in cold channel crossflow with a Zhao Wu, Dominique Laurence, Imran Afgan, 2016 DOI. Found: Jan 12 2017 9:31 AM	diabatic the	ermal bo	ound	ary con	ditions	
Import Source data   DOI						Reject

The list of import candidates can be limited to show only new import candidates or updated import candidates (see 'Updated import candidates' section below):

Import candidates from Mendeley E	ata for all organisational units
List of import candidates from Mendeley Data not current where the author(s) and / or the organisational unit have will continue to appear on the import candidates list until all, new import candidates or updated candidates	r in Pure. The datasets with the label Updated denotes datasets already in Pure, hanged in Mendeley Data. It is important to import the updated datasets, as these his is done. You can limit the result list using the drop down above to show either
51 results 🔍	Limit result All Sort by As returned by source 💌
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Sune Jeppesen, Søren Andersen, 2017 DOI.	Import candidates
Found: Jan 23 2017 1:08 AM	Updated import candidates
Import Course Jose L DOI	Point

The list of import candidates can also be sorted (the default sort order is 'as returned by source'):

Import candidates from Mendeley Da	ata for all organi	satior	nal u	inits	
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51 results 🔍	Limit result	All	-	Sort by	As returned by source 🤝
SAA Dataset 1					As returned by source
Sune Jeppesen, Søren Andersen, 2017 DOI.					Found time
Found: Jan 23 2017 1:08 AM					Title
Import Source data L DOI					Reject

When "Import" is selected for a Dataset candidate, a new window opens where the Person and Organisational unit details of the Dataset are displayed and the matches presented can be edited using the icons available:

Institutions in Mendeley Data	Organisational u	nits in Pure	
University of Manchester Centre for Jewish Studies	No match	University of Manchester Centre for Jewish Studies Will be created as a new external organisation	
		26	
Institutions in Mendeley Data	Organisational u	nits in Pure	
University of Manchester Centre for Jewish Studies	No match	University of Manchester Centre for Jewish Studies Will be created as a new external organisation	
	(	ta @ physics	
People match		Department of Physics Organizational unit. Department	
People in Mendeley Data	People in Pure	Department of Pure and Applied Chemistry Organizational unit: Department	
	-	The Pure University Organisational unit: University	
Lock, Nicolaj	MALIN	Faculty of Science Organisational unit: Faculty	
			_
Institutions in Mendeley Data	Organisational	units in Pure	
University of Manchester	Match F	Department of Physics aculty of Science	
Centre for Jewish Studies	0	rganisational unit: Department	
	6	14	

In order to save the Dataset candidate into Pure, the following rules apply:

a. It is possible to save the Dataset where an External Organisation AND an Internal Person with an active organisational association are matched:

recovery, recrystallisation and phase transformation in a TRIP-assisted d	ual phase
Organisational units in Pure	
Creational unit: University Organizational unit: University	*
Tata Steel Research Development and Technology Umuiden, Netherlands External organisation: Unknown	*
(84)	
People in Pure	
Bernard Ennis      Department of Civil Engineering      Person	*
Department of Civil Engineering     Faculty of Science     Organisational unit: Department	6
	Properties       Image: The Pare University         Organisational units in Pure       Image: The Pare University         Organisational units unit: University       Image: The Pare University         Image: The Pare Unit Date University       Image: Th

b. It is possible to save the Dataset where an internal Organisation AND a former internal Person are matched:

Test embargoed dataset 4 Jacob Hansen, 2016 DOI.		
Organisational unit match		
Institutions in Mendeley Data	Organisational units in Pure	
University of Manchester	Gene Area Comparisational unit: University	*
	+#	
People match		
People in Mendeley Data	People in Pure	
1 Hansen, Jacob	John, Augustine     Lducation - Torreer     Person: Doctor of Philosophy (Soudent)	-
9	Education     School of Environment, Education and Development     Organisational unit: Sub-school	0
	+4	

c. It is **not** possible to save the Dataset where only an External Organisation AND a former internal Person are matched; the save button is greyed out:

Test embargoed dataset 4 Jacob Hansen, 2016 <u>DOI</u> .		
Organisational unit match		
Institutions in Mendeley Data	Organisational units in Pure	
1 University of Manchester	Match Control University of Manchester Will be created as a new external organisation	*
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People match		
People in Mendeley Data	People in Pure	
	👤 John, Augustine	
Hansen, Jacob	3 matches Education - Former Person: Doctor of Philosophy (Student)	*
	Education School of Environment, Education and Development Organisational unit: Sub school	0
	*#	
	( <b>1</b> )	
Save Cancel		

Once the matches are saved, the Dataset editor will open, populated with content from Mendeley Data.

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Iden	tificatio	on o									
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Any subsequent updates made to the Dataset in Mendeley Data (e.g. metadata edits, new data files) will be automatically synchronised in Pure when the synchronisation job next runs.

#### **Updated import candidates**

Should a Dataset that has been previously synchronised be edited in Mendeley Data with updated Persons and/or Organisations, then this Dataset will re-appear in the import candidate list, with the label "Updated" next to it. It will then be possible to update the Person and Organisational affiliation details before updating the dataset in Pure.

Any content directly input into the Dataset record in Pure prior to becoming an 'Updated import candidate' (e.g. Relations, Temporal coverage, etc.) will be retained in the Dataset record in Pure.

#### **Rejecting candidates**

When processing a Dataset candidate, it is possible to either "Import" or "Reject" a given candidate. If a candidate is rejected it will not appear in the list of import candidates again. To re-introduce rejected import candidates, select the "Clear rejected dataset" button in the Mendeley Data Integration configuration screen.

In this configuration page, you can set up integration with Mendeley Data to automatically source Dataset content.
What is Mendeley Data integration
Enabling integration with Mendeley will automatically create Dataset content in Pure, associated with relevant Persons and Organisations. Relations with Research Outputs will also automatically be created, where available.
Enabling the Mendeley Data integration below will turn on the 'Mendeley: Dataset Synchronisation' job, and set it to run on a weekly basis. The settings can be changed in the 'Jobs' menu.
Mendeley Data integration
Turn on Mendeley Data integration to source existing and future Dataset content. Turn off Mendeley integration to pause the integration and prevent new Dataset content populating Pure.
Mendeley Data Integration
Institution ID #
55ba66b2-f276-5204-a3d8-acfa499794e0
Enter your institution ID from Mendeley, which can be found here bequires Mendeley Data Institutional Edition subscription)
Default managing organisation
Default managing organisation #
The Pure University Organisational unit: University
13/6
This organisation will be used for candidates where a managing organisation could not be determined
Dataset workflow settings
When Mendeley Data integration is enabled, the Datasets imported automatically will be set in the workflow step below. Already imported Datasets will not be affected.
For Validation 💌
Rejected candidates
It is possible to clear any rejected candidates using the button below - please note that all previously rejected candidates will be cleared. The action is not reversible.
2 rejected candidates will be cleared
Clear rejected candidates

Note that clearing rejected candidates will re-introduce all rejected candidates to the list of import candidates.

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## **Content imported from Mendeley Data**

The following fields are retrieved from Mendeley Data, and are available in the Pure Dataset record as read only:

- Title
- Description
- Persons (with the role 'Creator' assigned by default)
- Organisational unit
- DOI
- Files (represented as links back to the Mendeley Data record)
- Related links
- Embargo information<sub>2</sub>
- Keywords
- Article linking (DOI and ISSN)

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2 Where content is flagged as Embargoed in Mendeley Data, only the following fields are populated in Pure:

- Title
- Persons
- Organisational units
- DOI (inactive until the embargo period has passed)
- Embargo end date
- Keywords

Once the embargo period has passed, the Dataset record in Pure will be automatically updated with the full metadata complement from Mendeley Data

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