

## 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:

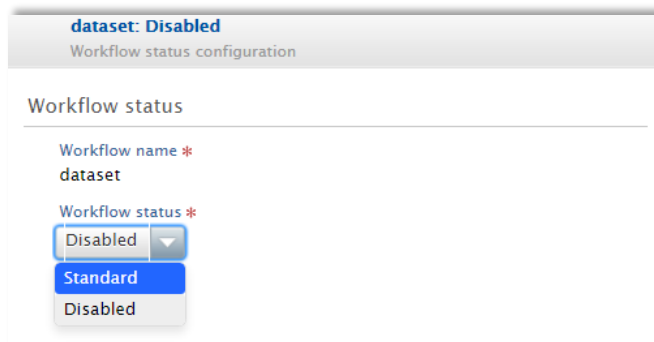
Go to Administrator > Datasets > Configuration:



#### 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:



c. *Configure the integration*

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

**Mendeley Data integration**

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  
 Off


Institution ID <sup>1</sup>

Enter your institution ID from Mendeley, which can be found [here](#) (requires Mendeley Data Institutional Edition subscription)

**Default managing organisation**


Default managing organisation <sup>1</sup>

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.

**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.

**0 rejected candidates will be cleared**

- i. Turn on Mendeley Data integration
- ii. Insert your institution's Mendeley institution ID in the "Institution ID" field<sup>1</sup>
- iii. 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.

d. Check the 'Mendeley Data: Synchronise Datasets' job

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.



### How does the Mendeley Data synchronisation work?

#### Matching Persons and Organisational units

a. Person IDs used by the Mendeley Data integration

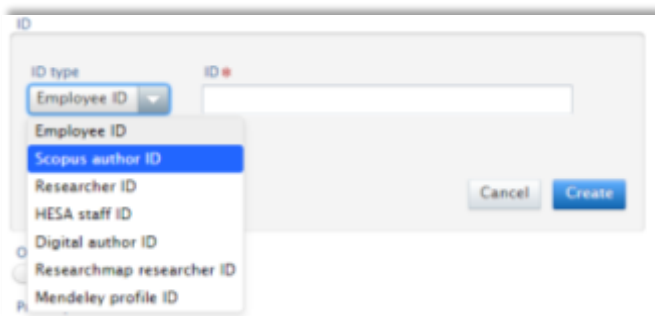
The Mendeley Data integration uses four different Person IDs to make a Person match:

i. Mendeley profile ID



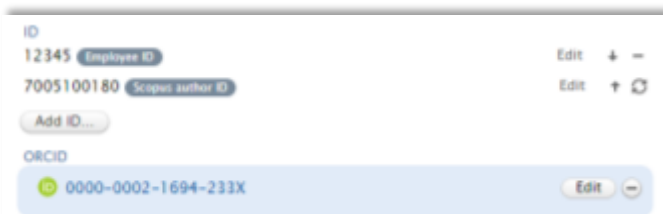
During the first matching process (described below), the Mendeley profile ID will be populated, such that any subsequent synchronisations will automatically import.

ii. Scopus author ID

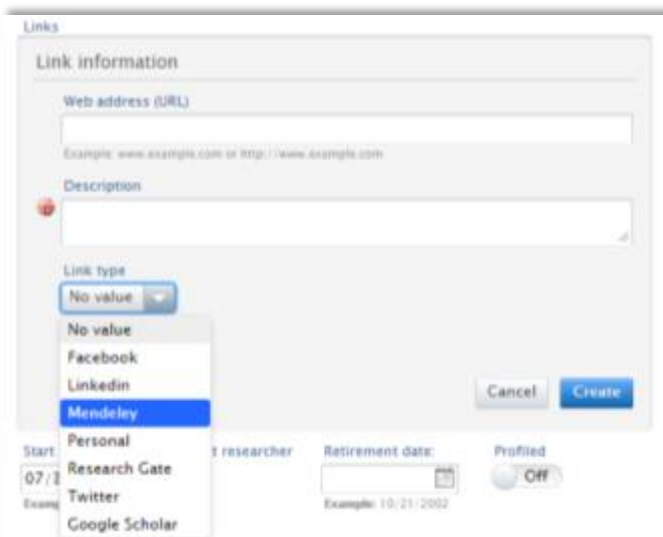


Scopus author IDs can be sourced in bulk using the “Scopus Author ID Import Job”.

iii. ORCID



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

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

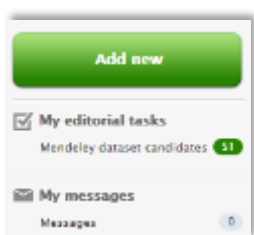
## c. Person & organisation matching

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.

The screenshot shows the Pure Athena University interface. At the top, there is a navigation bar with 'Pure Athena University', a search bar, and user information. Below this is a menu with 'Editor', 'Master data', 'Dashboard', 'FAAR', and 'Administrator'. The main content area displays a table with the following data:

	Import candidates	Entry in Progress	For validation	For re-validation	Validated
Department of Pure and Applied Chemistry		1			
Department of Statistics & Modelling Science		10			
The Pure University	51				
<b>Total</b>	<b>51</b>	<b>11</b>	0	0	0

Additional information at the top of the table area: Last Mendeley Data Import occurred: Jan 23 2017 1:08 AM (with warnings, see log) – the next import will happen at: Jan 25 2017 3:21 AM. There are also 'Views' options and a '+51' button on the right.

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 organisational units

List of import candidates from Mendeley Data not currently in Pure. The datasets with the label Updated denotes datasets already in Pure, where the author(s) and / or the organisational unit have changed in Mendeley Data. It is important to import the updated datasets, as these will continue to appear on the import candidates list until this is done. You can limit the result list using the drop down above to show either all, new import candidates or updated candidates

4 results Limit result **All** Sort by **As returned by source**

**Maps of chemical segregation, recovery, recrystallisation and phase transformation in a TRIP-assisted dual phase steel**  
 Bernard Ennis, 2016 DOI.  
 Found: Jan 12 2017 9:31 AM

Import Source data | DOI Reject

**WorkHardeningTADP\_raw data**  
 Bernard Ennis, 2016 DOI.  
 Found: Jan 12 2017 9:31 AM

Import Source data | DOI Reject

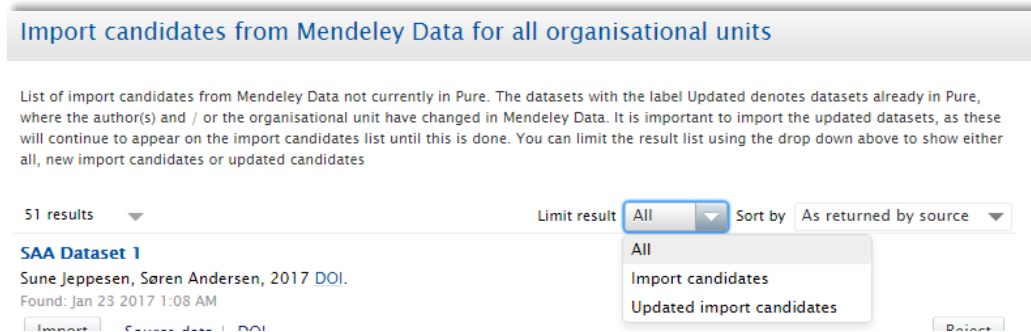
**Banding and work-hardening data**  
 Bernard Ennis, 2016 DOI.  
 Found: Jan 12 2017 9:31 AM

Import Source data | DOI Reject

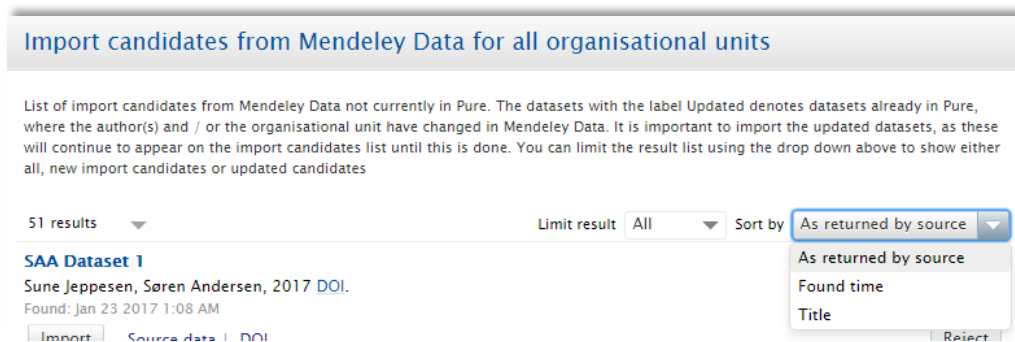
**Direct simulation of hot jet in cold channel crossflow with adiabatic thermal boundary conditions**  
 Zhao Wu, Dominique Laurence, Imran Afgan, 2016 DOI.  
 Found: Jan 12 2017 9:31 AM

Import Source data | DOI Reject

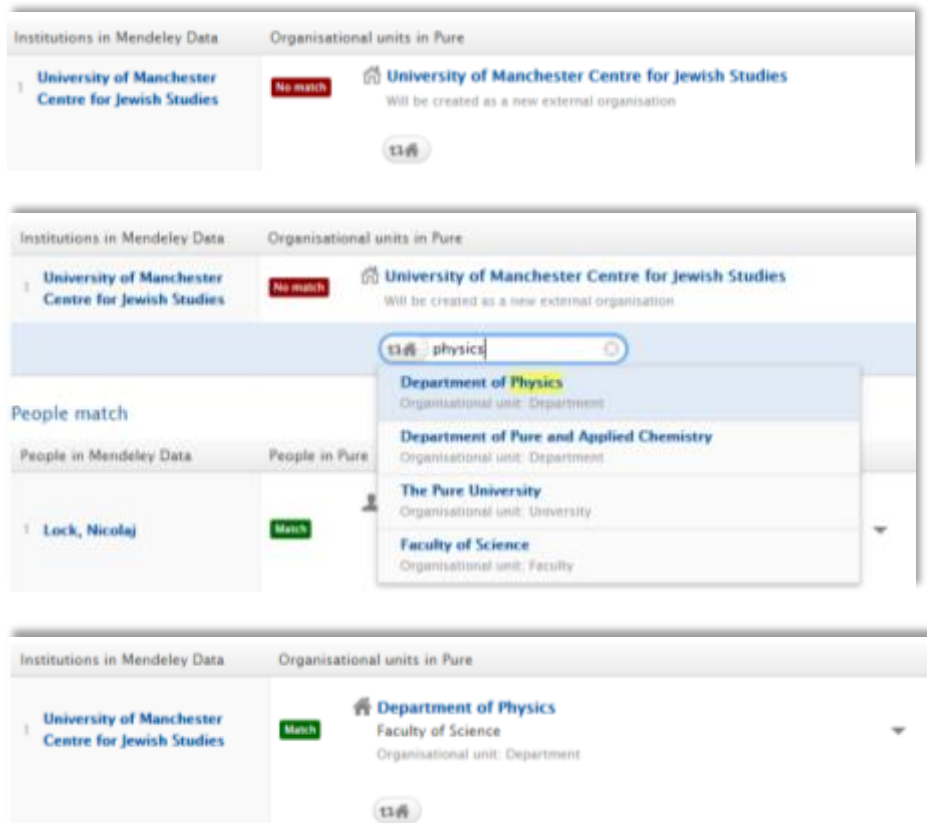
The list of import candidates can be limited to show only new import candidates or updated import candidates (see 'Updated import candidates' section below):



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



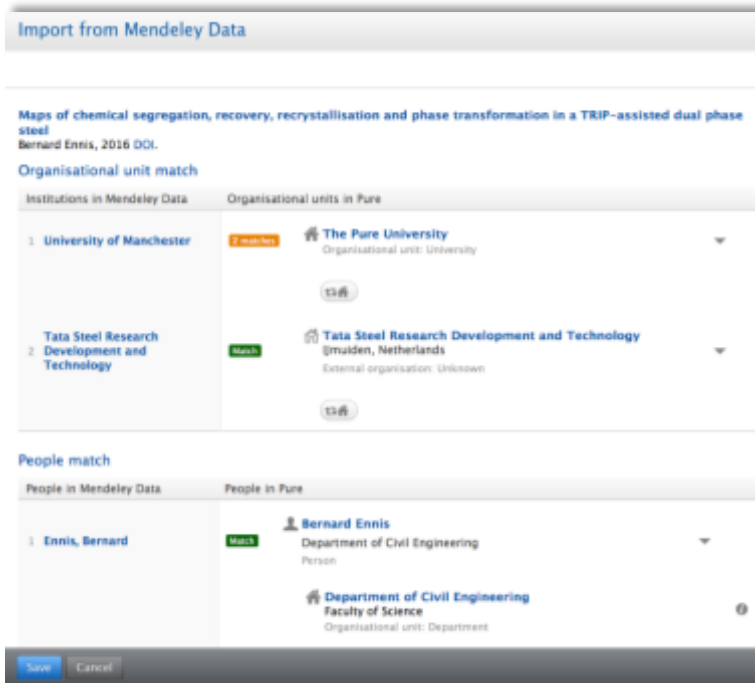
When "Import" is selected for a Dataset candidate, a new window opens where the Person and Organisational unit details of the Dataset are displayed and the matches presented can be edited using the icons available:



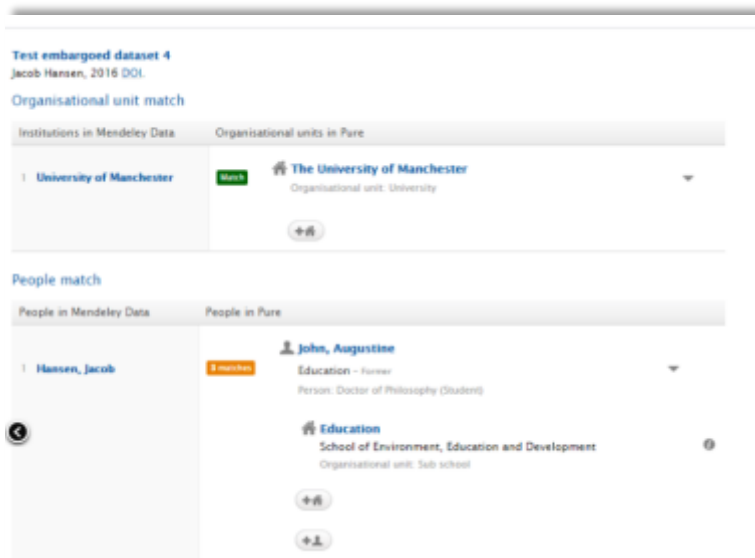


In order to save the Dataset candidate into Pure, the following rules apply:

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



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



- 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 DOI.

Organisational unit match

Institutions in Mendeley Data	Organisational units in Pure
1 University of Manchester	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <span style="background-color: green; color: white; padding: 2px 5px;">Match</span> </div> <div> <b>University of Manchester</b>  <small>Will be created as a new external organisation</small> </div> </div>

People match

People in Mendeley Data	People in Pure
1 Hansen, Jacob	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <span style="background-color: orange; color: white; padding: 2px 5px;">3 matches</span> </div> <div> <b>John, Augustine</b>  <small>Education - Former</small>  <small>Person: Doctor of Philosophy (Student)</small> </div> </div> <div style="margin-top: 10px;"> <b>Education</b>  <small>School of Environment, Education and Development</small>  <small>Organisational unit: Sub school</small> </div>

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

**Temperature and evaporative water loss of leaf-sitting frogs: the role of reflection spectra**  
Dataset

Identification ⓘ

**Title \***  
 Temperature and evaporative water loss of leaf-sitting frogs: the role of reflection spectra

**Description**  
 The MATLAB Frog simulator described in "Temperature and evaporative water loss of leaf-sitting frogs: the role of reflection spectra" by F. Herrerías-Azcué, along with the experimental and simulation data presented for the article can be found here. In this publication we show that the presence of a reflection peak in the near infra red in some leaf sitting frogs can contribute to a temperature difference of up to 3.2°C with respect to the frogs with...

**Temporal coverage**

Year Month Day → Year Month Day

→

**Date of data production**

Specific date

Period of time

**Geo location**

**Geographical coverage**

**Geospatial Point**

e.g. 57.013342,5.98304

**People ⓘ**

**People \***

- Nicolaj Lock, Creator**   
Person
- Department of Physics**   
Organisational unit: Department
- Francisco Herrerías-Azcué, Creator**   
Person

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.

**Mendeley Data integration**

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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

On

Institution ID \*

55ba66b2-f276-5204-a3d8-acfa499794e0

Enter your institution ID from Mendeley, which can be found [here](#) (requires Mendeley Data Institutional Edition subscription)

Default managing organisation

Default managing organisation \*

**The Pure University**

Organisational unit: University

This organization will be used for candidates where a managing organization 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.

## 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<sup>2</sup>
- Keywords
- Article linking (DOI and ISSN)

The screenshot shows a Mendeley Data record for a dataset. The title is "Temperature and evaporative water loss of leaf-sitting frogs: the role of reflection spectra". The description states: "The MATLAB Frog simulator described in 'Temperature and evaporative water loss of leaf-sitting frogs: the role of reflection spectra' by F. Herrerias-Azcué, along with the experimental and simulation data presented for the article can be found here. In this publication we show that the presence of a reflection peak in the near infra red in some leaf sitting frogs can contribute to a temperature difference of up to 3.2°C with respect to the frogs with...". The temporal coverage section has fields for Year, Month, and Day, with a range indicator. The date of data production is set to "Period of time". The geo location section includes a "Geographical coverage" field, "Point" and "Polygon" selection buttons, and a "Geospatial Point" field with a "Test" button. The people section lists two creators: "Nicolaj Lock, Creator" (Person) and "Francisco Herrerias-Azcué, Creator" (Person). The organisational unit for Nicolaj Lock is "Department of Physics".

<sup>2</sup> 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