Submitting Metadata to Crossref to Create DOIs

This page is for Internet2 staff reference. The repository librarian will perform these tasks.
Crossref provides a nice web interface for submitting reports and white papers, which are most of T&I's content, but it doesn't support submission of policies, working group charters, *etc.* that do not fall into that category. Crossref has a metadata XML schema for such "Posted Content," but the web UI does not support it yet. This document discusses how to submit metadata for both types of documents.

Submitting Metadata for Reports, White Papers, *etc.*

Metadata for reports, white paper, *etc.* can be submitted using Crossref's DOI Deposit Form.

- The Data Type is `Report`.
- `Title` is the document's title.
- `Report DOI` is the DOI you're creating. It's `10.26869/` followed by the Repository ID, (*e.g.*, `10.26869/TI.53.1`).
- `URL` is the URL of the T&I repository metadata page for the document. This should be Confluence's "Tiny Link," **not** the URL displayed in your browser's location bar.
- `Contributors` can be people or organizations, and they can have various roles. Add ORCids if provided.
- `Publisher` is `Internet2`.
- (I haven't been entering `Institution Information`.)
- At least the year portion of `Publication Dates` must be entered. Note that T&I documents are published `online`.

After you click on `Submit Report DOI`, you'll be prompted to login and provide your email address for notifications about this submission. Credentials are available in the TI-Shared vault.

Submitting Metadata for Other Content Types

We are using Crossref's Posted Content document type for this. Here's how that is done.

1. Create an XML file containing the metadata for the Posted Content document. posted-content-template.xml is provided by Crossref. TI.1.1.xml and TI.53.1.xml are examples for T&I documents; it's probably easiest to make a copy of one of those and edit it for your new document. You probably want to use a schema-validating XML editor to avoid syntactic and semantic errors (Crossref recommends Oxygen or XmlSpy), but a normal text editor can also be used.
   - Authors/contributors can be either people or organizations (e.g., a working group). TI.53.1.xml has examples of both <person_name> and <organization>. Add ORCids if provided.
   - The sequence attribute for <person_name> and <organization> (first or additional) is important. Don't leave it out. (First would be the lead author.)
   - If you have no known contributors, remove the <contributors> element entirely. Sequence is, of course, not important in this case.
   - <doi_batch_id> and <timestamp> aren't part of the metadata, but they must increase if you need to resubmit the metadata. Note that the examples encode the current date/time, including seconds, in those values.
   - <depositor_name> and <registrant> should be Internet2.
   - <email_address> should be your address; it's where success/fail and other notifications about your submission will be sent.
   - <group_title> should be Internet2 Trust and Identity Policy. I think we can invent any group titles we want, but I figure it's probably best to lump it all together for now.
   - <title> is the document's title.
   - <posted_date> is the document's publish date. You must provide at least <year>. If you do not provide <month> or <day>, remove them entirely (including the XML tags).
   - <doi> is the DOI you're creating. It's 10.26869/ followed by the Repository ID, (e.g., 10.26869/TI.53.1).
   - <resource> is the URL of the T&I repository metadata page for the document.
2. Test your XML file using Crossref's XML parser. This will not guarantee a successful submission, but it does weed out many problems before you try to submit.
3. Submit your XML files at http://doi.crossref.org/; the file type is Metadata. The process is described in Uploading files using an interface.
4. Edit the document's T&I metadata page to add the DOI (`10.26869/` followed by the Repository ID) and Persistent URL (`http://doi.org/` followed by the DOI).
5. Watch your mail to see when the submission has been processed (usually less than a minute but can be longer). Assuming success, test the DOI by clicking on the document's Persistent URL from the repository index page.

Updating Submitted Metadata

To update metadata previously submitted to Crossref, submit replacement metadata. There is no mechanism for editing Crossref's copy of the metadata.