

# HRA Open User Guide: Funder Administrator

June 2024

HRA Open is an web-based platform sponsored by the [Health Research Alliance](#) (HRA) that promotes open access and enables HRA member-funded awardees to link grant support to awardees' research outputs.

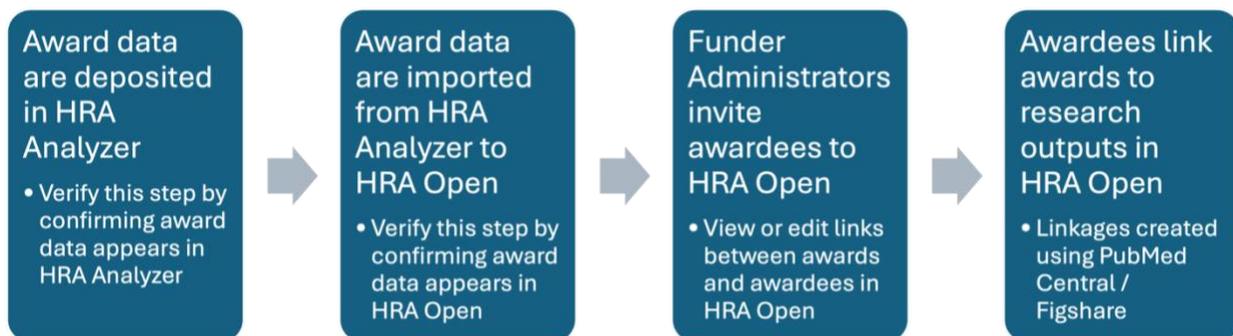
HRA's collaboration with the National Library of Medicine enables awardees to deposit peer-reviewed publications into PubMed Central. It goes one step further by providing an additional functionality to upload and share other materials related to their project, including figures, datasets, preprints, presentations, and other research outputs. [Learn more about PMC and this partnership](#). You can also [search for articles deposited via this partnership in PMC](#).

View the most recent version of the [HRA Open Guide for Awardees](#) on [the HRA website](#).

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## How HRA Open Works



In order to participate in HRA Open, HRA member organizations must have grant records deposited in [HRA Analyzer](#). Award data is imported from HRA Analyzer into HRA Open on a scheduled frequency. This step requires human review and import of data from HRA Analyzer to HRA Open is *not* immediate! Verify whether award data are in HRA Analyzer and then in HRA Open by checking both platforms for the appropriate award data. Once award data appears in HRA Open, funder administrators may invite awardees to participate in HRA Open ([instructions for inviting awardees are below](#)). Awardees are sent an invitation to participate in HRA Open from their funder, detailing how to create a link from their unique identifier (e.g. ORCID) to their award. When the awardee has published a manuscript or other research output, they then use HRA Open to link that research output to the previously linked award in HRA Open (via Figshare within HRA Open, and via PubMed Central).

## Prerequisite: Upload Award Data to HRA Analyzer

Award data must appear in HRA Open in order for awardees to be able to link to them. Award data are imported from HRA Analyzer into HRA Open. **Email Jenna Hicks ([jenna@healthra.org](mailto:jenna@healthra.org)) for assistance in importing award records into HRA Analyzer.**

1. [Learn more about HRA Analyzer on the HRA website.](#)
2. The easiest way to submit award data is to email a report from your grants management system or other database to [supportHRA@dimensions.ai](mailto:supportHRA@dimensions.ai). The Digital Science/Dimensions team will review it for completeness and ensure it fits standards for HRA data structure.
  - a. ProposalCentral users can enable an automatic feed from ProposalCentral to HRA Analyzer by requesting this from their ProposalCentral contact.
3. Verify that award data appear in HRA Analyzer by searching for the award(s) in HRA Analyzer (<https://hra.dimensions.ai/>).

## Step 1: Submit Participation Request Form

HRA member organizations must submit [this participation request form](#) ([https://www.healthra.org/wp-content/uploads/2024/05/Template-HRA-OPEN-Participation-Form-05\\_28\\_2024.docx](https://www.healthra.org/wp-content/uploads/2024/05/Template-HRA-OPEN-Participation-Form-05_28_2024.docx)) to HRA (email the form to Jenna Hicks at [jenna@healthra.org](mailto:jenna@healthra.org)).

Organizations must fulfill the following prerequisites in order to participate in HRA Open:

1. Award data must be uploaded to HRA Analyzer (see [Prerequisite: Upload Award Data to HRA Analyzer](#))
2. Organizations must have a public or open access policy.
3. Awardees are strongly encouraged to have an [ORCID](#). An ORCID is a unique ID for researchers, and is one way in which awardees can log into the HRA Open platform.

## Step 2: Designate Funder Administrators

The participation form in Step 1 includes fields for HRA Open contacts. These contacts will be designated as Funder Administrators (Funder Admins) in HRA Open. HRA staff will send each Funder Admin a unique invite link (sent via email). This is the only way to gain access to the [HRA Open administrative portal](#). Your invite will indicate the HRA member organization for

which you have been assigned as an administrator and will have instructions and the link for signing up as a Funder Admin in HRA Open.

As a Funder Admin, you will be able to:

1. Invite awardees to the HRA Open platform so they can link data they deposit to your funding and be able to deposit award-related publications into PubMed Central.
2. Confirm that awardees have linked their HRA Open profiles to the appropriate award and unlink incorrect award-awardee linkages. (Note: awardees cannot unlink erroneously linked awards. See [Unlink Awards from Awardees instructions](#) below.)
3. Confirm associations of research outputs in HRA Open, such as datasets, to awards.

Like awardees, you can sign up with either an ORCID, a Google account or an alternative email address. It does not matter which one you choose, and it does not have to be the same email address the invitation was sent to. After your initial login, you can return to HRA Open using this URL: <http://hraopen.healthra.org>.

### **Step 3: Verify that Award Data Appears in HRA Open**

Award data must appear in HRA Open in order for awardees to be able to link to them. Award data are imported from HRA Analyzer into HRA Open, and this process is not immediate. **Email Jenna Hicks ([jenna@healthra.org](mailto:jenna@healthra.org)) for assistance in importing award data into HRA Analyzer.**

1. Verify that award data appears in HRA Analyzer by searching for the award(s) in HRA Analyzer (<https://hra.dimensions.ai/>). [Learn more about HRA Analyzer](#).
2. Once it is verified that the award data appears in HRA Analyzer, verify that the award(s) also appear in HRA Open (<https://www.hraopen.healthra.org/>). You may search for awards by award project title, award code, or awardee name using the radio buttons beneath the search bar.
3. Once it is verified that the award data appears in HRA Open, awardees may be invited to participate in HRA Open.

### **Step 4: Invite Awardees to HRA Open**

Awardees need to be invited to the HRA Open platform by the Funder Admin of the organization who awarded them the grant.

1. Before Funder Admins invite awardees, they must make sure awards have been deposited to HRA Analyzer, and that the HRA Analyzer records appear in HRA Open. ([See Step 3, above](#)). Awardees **MUST** be in HRA Analyzer before using HRA Open. **Please email Jenna Hicks at [Jenna@healthra.org](mailto:Jenna@healthra.org) for assistance getting awardees in HRA Analyzer.**
2. Once it is verified that award data appears in HRA Open, click '**Invite awardees**' at the top of the page (see Figure 1; annotation 1) to be taken to the invitation form. Multiple email addresses (comma separated) can be pasted into the first field (see Figure 1; annotation 2), and an optional personal message that will be included in the invitation

can be added (see Figure 1; annotation 3). You can also cc yourself on the email by clicking the checkbox (see Figure 1; annotation 4). (See template wording for personal message below Figure 1.)

The screenshot shows the 'Invite new awardees' interface. At the top, there is a navigation bar with the Health Research Alliance logo on the left and three links: 'Manage admins', 'Invite awardees' (highlighted with a green circle and the number 1), and 'Submit data'. Below the navigation bar, the main heading is 'Invite new awardees'. The form consists of several fields: a text input for 'Email address (separated by comma)' (annotated with a green circle and the number 2), a text input for 'Add personal message' (annotated with a green circle and the number 3), a checkbox labeled 'Add example@funder.org to invite email CC' (annotated with a green circle and the number 4), and a 'Send invite' button. At the bottom left, there is a 'download history' button (annotated with a green circle and the number 5).

Figure 1. Screenshot of 'Invite awardees' view on HRA Open.

3. (Optional): Once emails have been sent, you can check the status of invitations using the 'download history' button at the bottom of this page (see Figure 1; annotation 5). This will create a csv file of your invitations (including the email and date sent).

#### Template wording for personal message:

#### **IF YOU REQUIRE ARTICLES TO BE AVAILABLE IN PMC**

Dr. \_\_\_\_\_  
Re: Award Number \_\_\_\_\_

**Name of Funding Organization** established a public access policy that requires all journal articles resulting from **Funder's** funding be made freely available in PubMed Central (PMC) within 12 months of publication. It is the responsibility of the awardee to ensure journal articles are deposited into PMC. **Name of Funding Organization** has adopted the procedures established by the Health Research Alliance (HRA) which has partnered with the National Library of Medicine (NLM) to enable HRA member-funded awardees to deposit their publications into PMC with an embargo no longer than 12 months. The first step involves linking award information to the awardee profile in the HRA Open system. Please refer to the [HRA Open User Guide for Awardees](https://www.healthra.org/wp-content/uploads/2024/05/HRA-Open-Guide-for-Awardees-April-2024.pdf) (<https://www.healthra.org/wp-content/uploads/2024/05/HRA-Open-Guide-for-Awardees-April-2024.pdf>) and follow the instructions provided.

**IF YOU DON'T REQUIRE PMC DEPOSIT, INCLUDE WORDING LIKE THIS:**

**Name of Funding Organization** strongly recommends that awardees deposit journal articles into PubMed Central (PMC) to make them freely available to the community as soon as possible.

**Name of Funding Organization** has adopted the procedures established by the Health Research Alliance (HRA) which has partnered with the National Library of Medicine (NLM) to enable HRA member-funded awardees to deposit their publications into PMC with an embargo no longer than 12 months. The first step involves linking award information to the awardee profile in the HRA Open system. Please refer to the [HRA Open User Guide for Awardees](https://www.healthra.org/wp-content/uploads/2024/05/HRA-Open-Guide-for-Awardees-April-2024.pdf) (<https://www.healthra.org/wp-content/uploads/2024/05/HRA-Open-Guide-for-Awardees-April-2024.pdf>) and follow the instructions provided.

## Step 5: Awardees Link to their Awards

After awardees accept the invitation to join HRA Open, they can link to their awards. This linking step should be done by the awardees, not by the Funder Admin. The instructions below should be followed by awardees (a version is included in the [HRA Open Guide for Awardees](#)), and are included here in case awardees come to Funder Admins with questions about the process.

In HRA Open, awardees should click on the Health Research Alliance logo in the top left to go to the home screen.

1. Find award/awardee: Awardees then use the search and filter functions to find awards. Awards can be searched by award project title, award code (aka award ID), or awardee name.
2. Awardees link to their award: Clicking the 'Link award' button to the right of the grant listing will bring up the award details page. After confirming the award details are correct, the awardee should click 'Confirm & link' at the bottom of the page. Once confirmed, the award will display on the awardee's profile page.
  - a. If an awardee cannot find their award, the Funder Admin should check HRA Analyzer to confirm the grant record is listed correctly in that database. Awards MUST be in HRA Analyzer to appear in HRA Open. Contact Jenna Hicks ([jenna@healthra.org](mailto:jenna@healthra.org)) for information on adding grant records to HRA Analyzer.
3. Funder Admins can view confirmed award-awardee links in the search results on the home page of HRA Open (see Figure 2). Awards that are linked to an awardee will show a circle with an awardee avatar (an initial, photo, or a gray placeholder 'headshot') in place of the rectangular 'Link awardee' button.

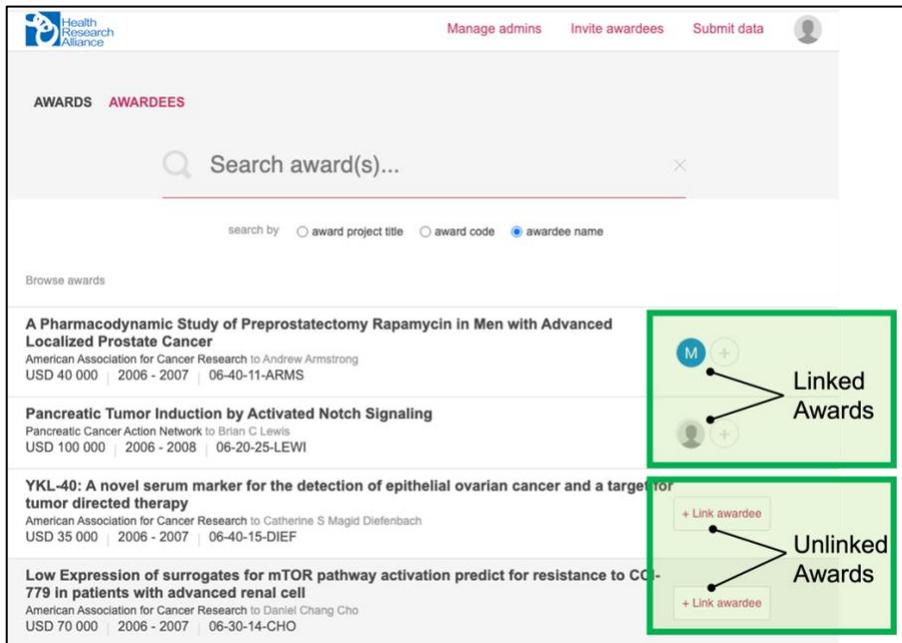


Figure 2. Screenshot of HRA Open home page showing examples of awards that have been linked to an awardee (first two awards), and awards that are not linked to an awardee (second two awards).

## Unlink Awards from Awardee

Only HRA staff and Funder Admins, like yourself, have the ability to unlink any mistakenly linked awards from awardee profiles. Awardees cannot do this themselves and may contact you if they have made a mistake (or if they believe you mistakenly linked an award to their profile). You can only unlink awards from the HRA member organizations for which you are an administrator.

1. Use the 'Awardee' tab in HRA Open to search for the awardee in question and find their profile.
2. Click 'Unlink' next to a user or award to remove that link from their profile immediately (see Figure 3, below).
  - a. Unlinking an award is reversible; to re-create the link between an award and an awardee, [see Step 5 above](#).

If more information about the award/awardee pair is needed, please get in touch with the awardee directly.

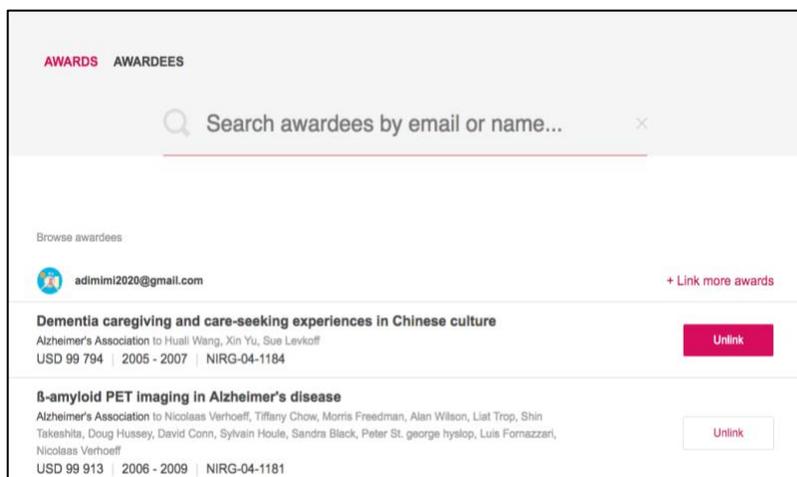


Figure 3. Screenshot of the HRA Open homepage showing the 'Awardees' tab. Clicking the 'Unlink' button to the right of the award record will remove the connection between that awardee and that award.

## View Linked Research Outputs

Awardees may link their awards to research outputs in two ways:

- Manuscripts may be linked in PubMed Central (the [HRA Open Guide for Awardees](#) provides detailed instructions for linking manuscripts in PubMed Central)
- Non-manuscript research outputs (e.g., figures, datasets, preprints, presentations, protocols) may be linked by depositing them in Figshare within the HRA Open interface, or another repository. Figshare is one of many repositories that follow [FAIR principles for data sharing](#).

To view linked research outputs in PubMed Central, you can search for articles in PMC in multiple ways:

1. Deposited as an author manuscript through the NIH Manuscript Submission System via the HRA Open partnership:  
[https://www.ncbi.nlm.nih.gov/pmc/?term="hrams+author+manuscript"%5BFilter%5D](https://www.ncbi.nlm.nih.gov/pmc/?term=)
2. Articles that have HRA member funder metadata associated (regardless of how the article was submitted):  
<https://www.ncbi.nlm.nih.gov/pmc?term=%22hra%20funded%22%5BFilter%5D>
3. Use the '[Advanced Search](#)' function in PubMed Central. Select the 'Grants and Funding' term from the dropdown menu, and add in terms related to a specific funding organization. Tip – combine multiple search terms using the 'OR' operator (example: "American Heart Association" OR "AHA"; this search string will return results that have funder metadata matching "American Heart Association" or "AHA").

To view public Figshare submissions:

1. Visit <https://hra.figshare.com/>
2. The [Figshare search page](#) can be used to search for specific awardees or award IDs/grant numbers by typing them into the search bar (see Figure 4; annotation 1).
3. To filter by funder, visit the 'Groups' page and select a funder, or use [Figshare's search page](#) to filter by funder (under the 'Group' menu at the bottom of the left sidebar; see Figure 4; annotation 2).

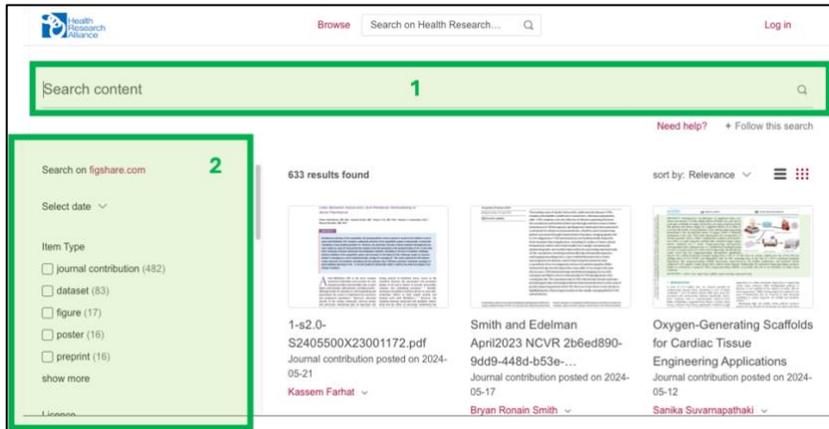


Figure 4. Screenshot of Figshare's HRA search page.

## Get Help

For technical help:

Log a ticket at [support.figshare.com](https://support.figshare.com) or email [support@figshare.com](mailto:support@figshare.com).

For other questions:

Email Jenna Hicks at [Jenna@healthra.org](mailto:Jenna@healthra.org)