



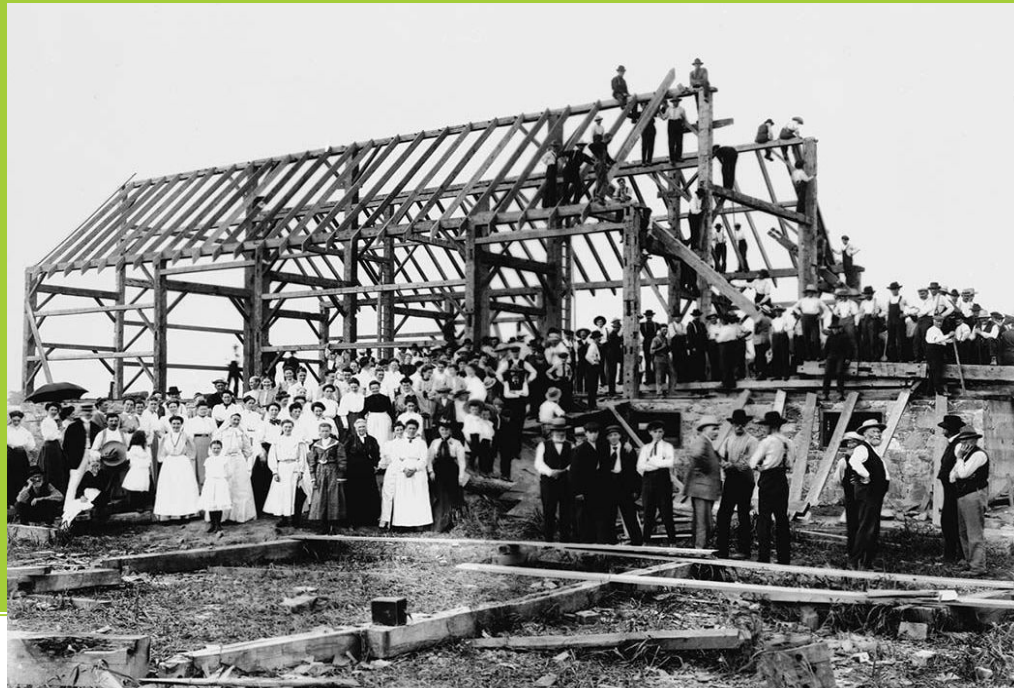
ORCID | Implementation & Understanding the API

South Africa Workshop, Benoni | November 5, 2018

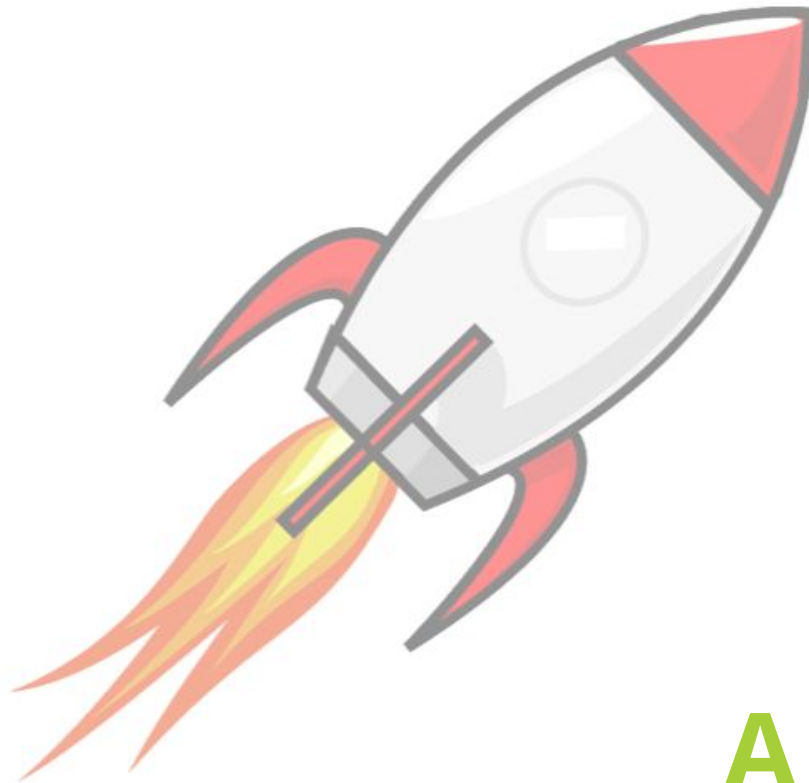
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Once upon a time..

Go on ORCID, just build it!



October 2012– API 1.0 Launch



A Big Panic!!

Winter 2012

- ORCID hires first staff developer
- ORCID starts process of building internal developer team
- Quick iterations to gain server stability

January 2013 STABILITY :-):-):-)

2013 Webhooks added - UI Search & Link Wizard -1.1
API is live - New work-types

2014 Free registration for public API - Long-lived permissions -Tokens expiry time enhanced



2015 1.2 API is live - Affiliation section - Funding section -
New simplified scopes released

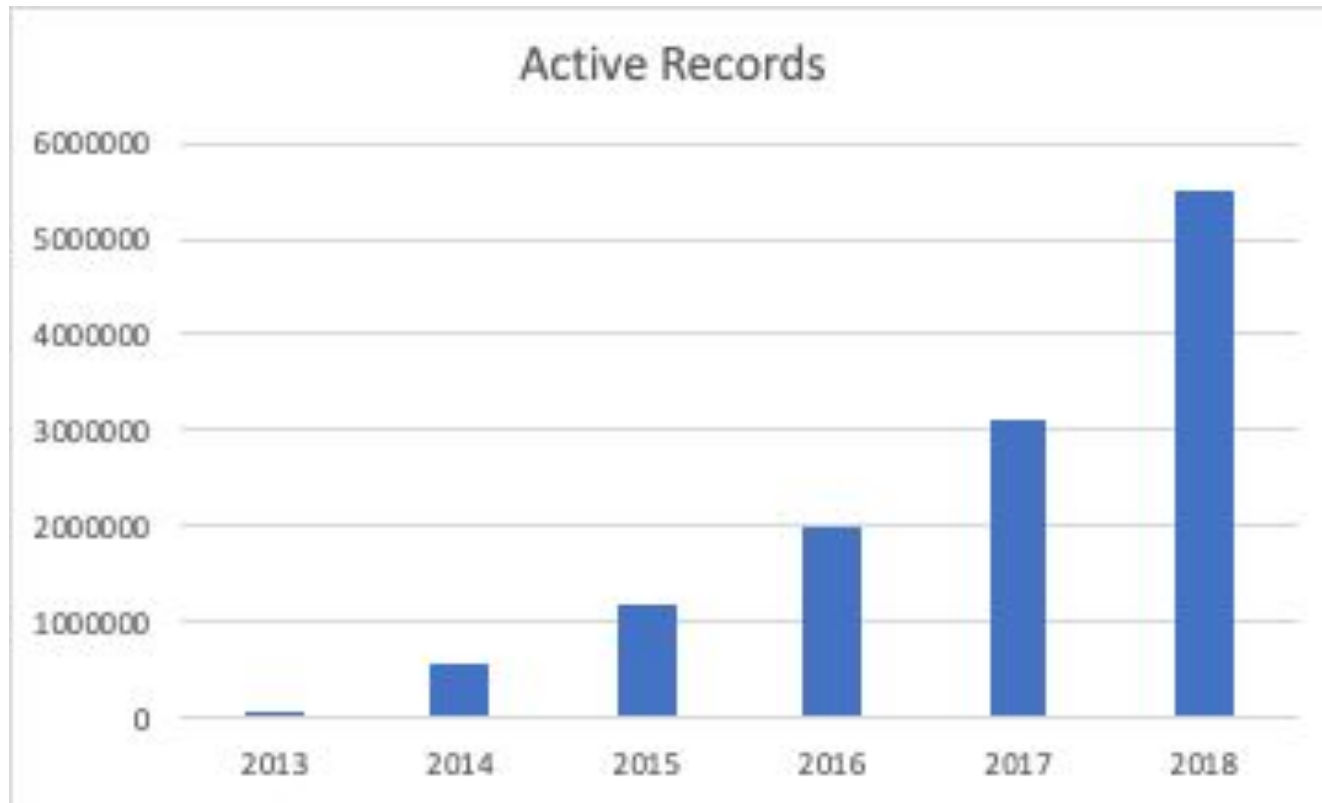
2016 First publishers start requiring ORCID iDs - Social and
institutional sign in options

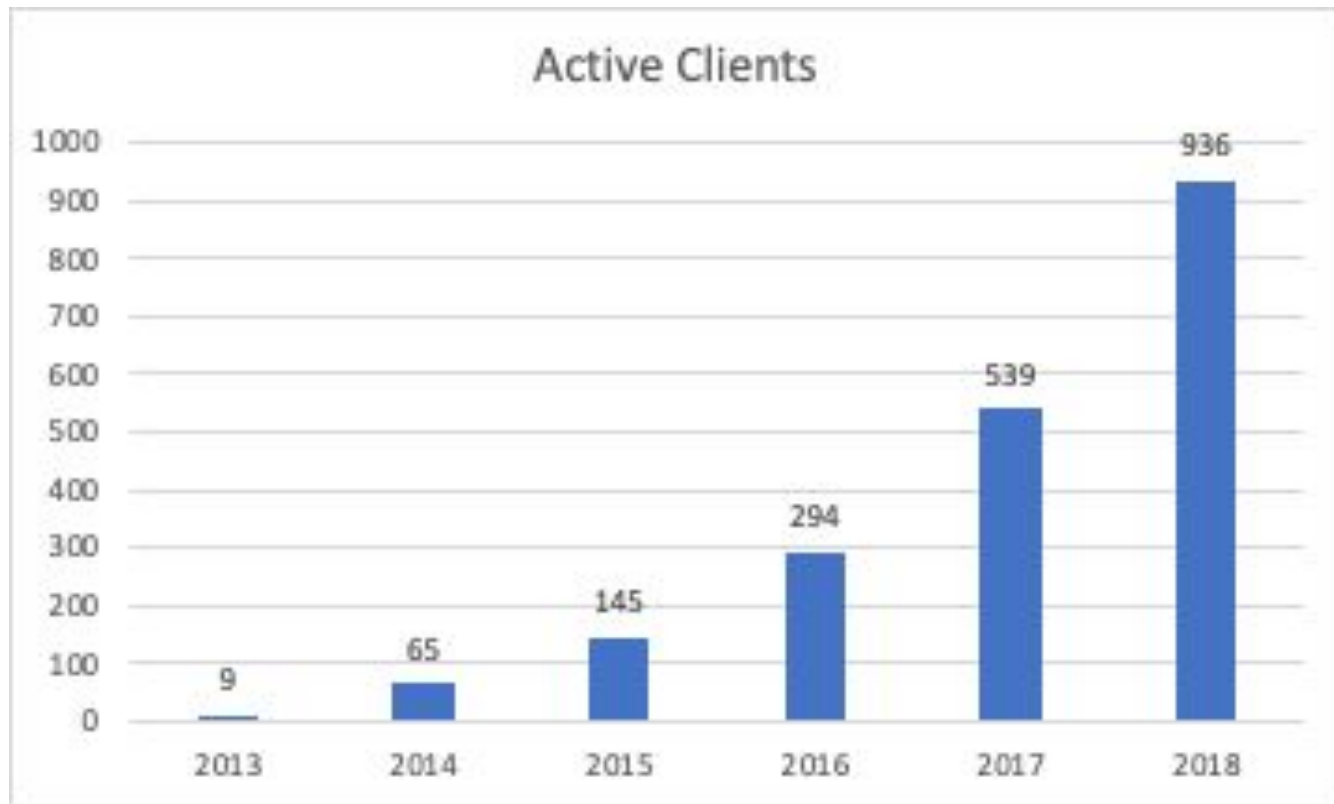
2017 2.0 API is live - Per item read, update, delete - Peer
review section -Dynamic support for new identifier types

2018 3.0_dev1 is underway - New affiliation types:
Qualifications - Distinctions - Membership - Service, etc..



API usage since 2013

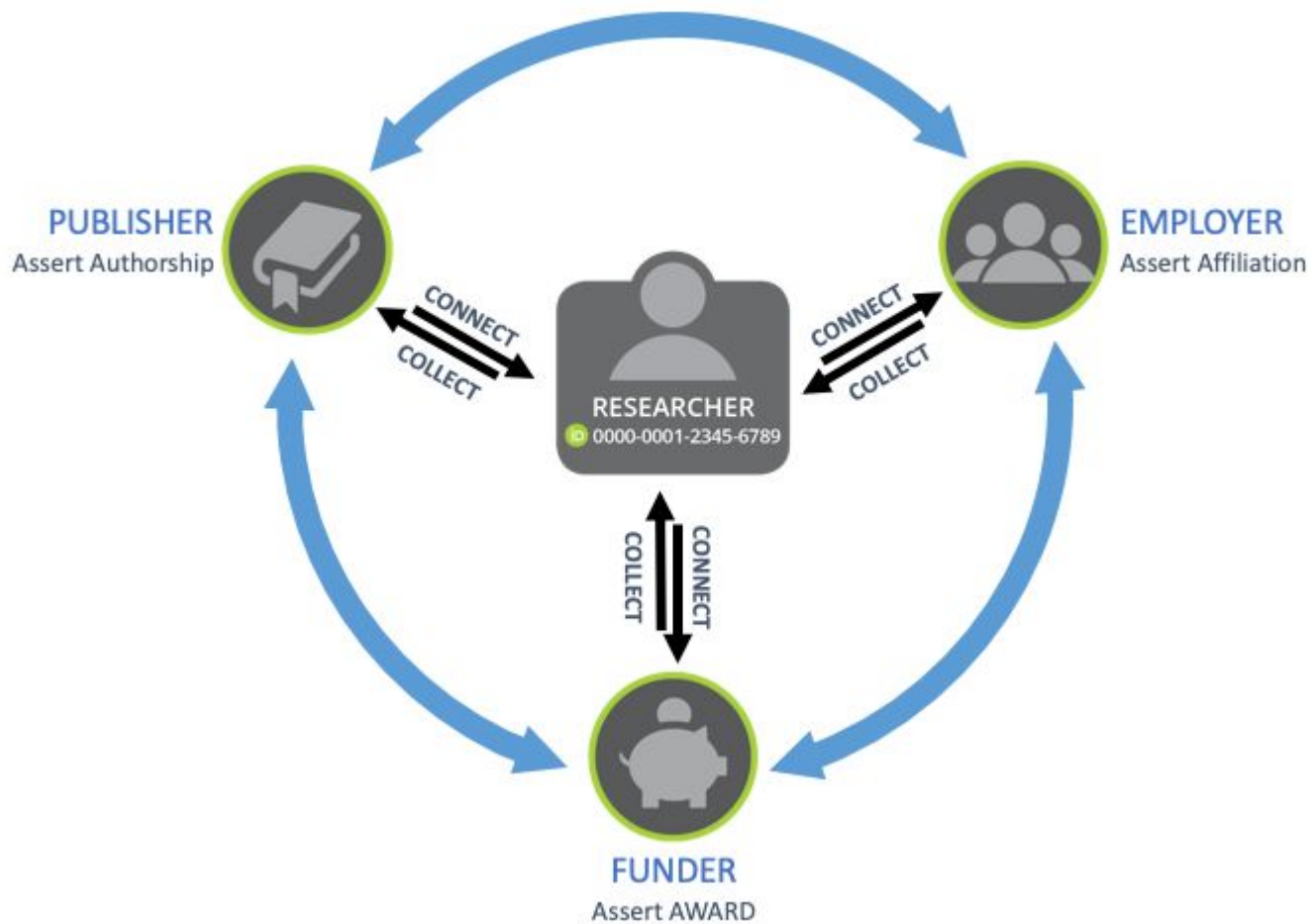




With 663 live Integration and counting..

Implementing ORCID

Understanding the API and implementation communication



Integrating with ORCID API

WHAAAA?!?!?



Implementation

- An outreach campaign to students/researchers and academic staff
- Connection with the university repository system (ORCID enabled systems)
- Direct support from ORCID, Tech and Human
- Possibility to write the affiliation source on the ORCID record
- Keeping track on the research dashboard and how it is connecting with the other research platforms

Engaging Researchers

- **Technically**, integrating ORCID involves adding <person ID> and <source> fields to data models, mapping to the ORCID API, and implementing OAuth and RESTful calls.
- **Socially**, it is critical that researchers are engaged in the process.

Vendor Connections

Publishing

- Editorial Manager
- Open Journal Systems pkp
- ScholarOne
- eJournalPress
- ReView

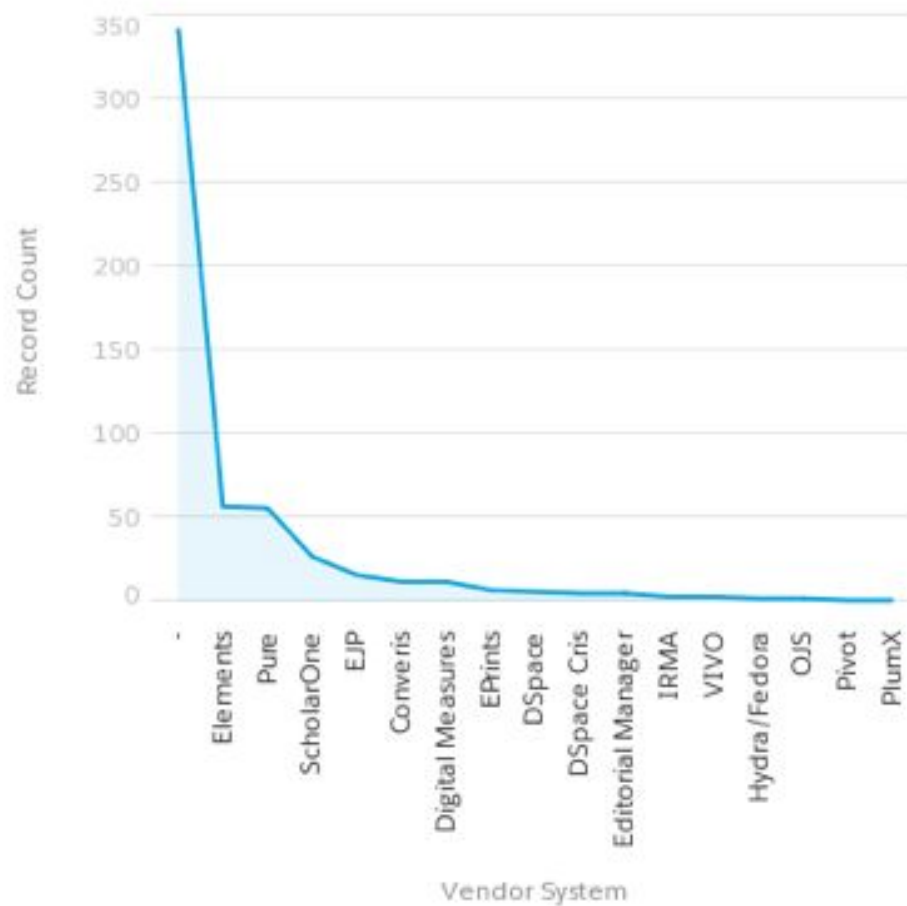
Document / data repositories

- ePrints
- Hydra/Fedora

RIMS Systems

- InfoEd
- Converis
- DSpace-CRIS
- Elements
- IRMA
- Pure
- Vivo

Integrations by Vendor System



Custom Connections

Via the ORCID API

- Fine-tuned control & permissions
- Customized buttons, user flows, feedback
- Test & troubleshoot with ORCID team

Case examples:

<https://members.orcid.org/resources>

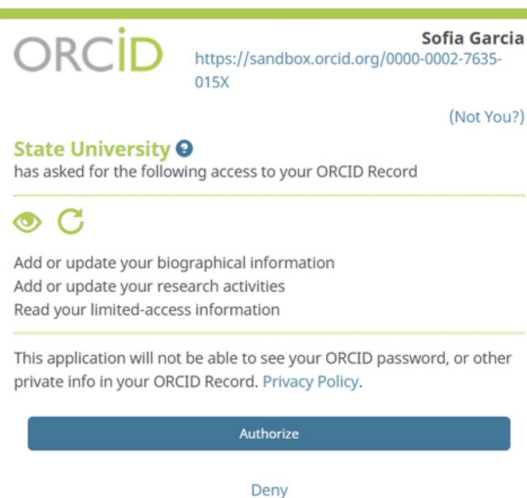
Code examples:

<https://members.orcid.org/api/resources/code-examples>

Let's simplify...

AUTHENTICATE

Authenticate ORCID iDs to ensure researchers are correctly identified in your systems



DISPLAY

Display iDs to signal to researchers that your systems support the use of ORCID



 <https://orcid.org/0000-0001-2345-6789>



COLLECT

Collect information from ORCID records to fill forms and support research reporting



Researcher Database

Name

Sofia Maria Hernandez Garci

ORCID iD

<http://orcid.org/0000-0001->

Method: GET

Accept: application/vnd.orcid+xml or
application/vnd.orcid+json

Authorization type: Bearer

Access token: [Stored access token]

URL: [https://api.sandbox.orcid.org/v2.1/\[ORCID iD\]/record](https://api.sandbox.orcid.org/v2.1/[ORCID iD]/record)

CONNECT

Connect information to ORCID records for trusted sharing with others



▼ Employment (1) ?

ORCID: Amsterdam, Netherlands

2015-04-30 to present | Lecturer

Organization identifiers

Ringgold: 385488

ORCID: Bethesda, MD, US

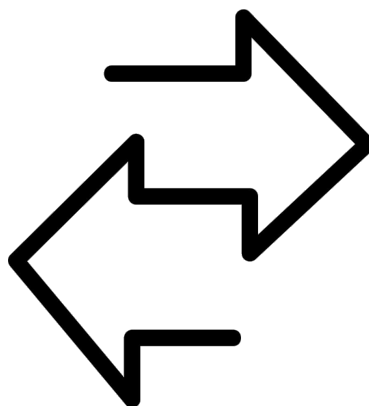
Created

2018-03-22

Source: ORCID University

SYNCHRONIZE

Synchronize information between ORCID records and your systems for reporting accuracy and speed



 **Nabil Aziz Ksibi**

ORCID ID

 <https://orcid.org/0000-0002-3226-7485>

[View public version](#)

[Switch account >](#)

 [Display your iD on other sites?](#)

 [Public record print view?](#)

 [Get a QR Code for your iD ?](#)

Also known as

Nabil Ksibi, N.Ksibi, N.A.Ksibi,
نبيل عزيز قصيبي, نبيل قصيبي, K.Nabil Aziz,
ن . ع . قصيبي, عزيز قصيبي, قصيبي عزيز,
قصيبي نبيل

Communications Toolkit

- Identify/work with champions (at all levels)
- Pilot with small groups first
- Top-down AND bottom-up approach
- Regular updates and reminders
- Keep messaging relevant
- Use straightforward language
- Create custom materials (and/or use our templates)
- Use our resources (and us)



API 3.0

Understanding the API and implementation communication



API 3.0

- **3.0_dev1 is underway**
- **New affiliation types**
 - Qualifications
 - Distinctions
 - Membership
 - Service
- **Disambiguated organization identifier required for affiliations**
- **Stricter identifier validation normalized identifiers**



Pilot Programs

- API 3.0_rc1 is available now and supports new affiliation types and section for research resources. Test program launched in October
- API 3.0_rc2 will support On Behalf Of workflows (User and Token Delegation). Soliciting interest in pilot project Q4 2019

On Behalf Of User

Distinguishes between user assertions and member assertions. Improved transparency.

Line 1 of activity item, usually a title or an institution
Line 2 of activity item
Line 3 of activity item: Usually dates and/or item type

External ID: [externalid1.value](#)
External ID: [externalid2.value](#)
[Hide details](#) ▲

URL
<http://sampleurl.org/stuff/things/thisparticularthing>

Another field
Content of another field

Created
2014-07-09

Text about the meaning of "on behalf of" goes here.


Text about the meaning of preferred source goes here.




Source: *Source 1 client application name on behalf of* Sofia Maria Hernandez Garcia ★ Preferred source

On Behalf Of Token Delegation

Enables one member to pass permissions to another member. Distinguishes which member is responsible for the assertion and which member wrote to the record.

Line 1 of activity item, usually a title or an institution
Line 2 of activity item
Line 3 of activity item: Usually dates and/or item type

External ID: [externalid1.value](#)
External ID: [externalid2.value](#)
[Hide details](#) 



URL
<http://sampleurl.org/stuff/things/thisparticularthing>



Another field
Content of another field

Created
2014-07-09

Text about the meaning of "on behalf of" goes here.

Text about the meaning of preferred source goes here.

Source: *Source 1 client application name on behalf of Source 2 client application name* ★ Preferred source



SPECIAL THANKS TO



ORCID support at TENET: orcid@tenet.ac.za



id THANK YOU!