Guide: Register an ORCID Public API Client

Purpose: This is a template guide that can be adapted and used by ORCID service providers to help non-ORCID member organizations (research institutions, publishers, societies, other) that need to register an ORCID Public API client to use the ORCID Public API to obtain authenticated ORCID iDs.

Introduction

Registering an ORCID Public API client involves three steps:

- 1. Register an ORCID iD
- 2. Verify your primary email address
- 3. Register your Public API client

A Public API client must be connected to an individual's ORCID iD. The ORCID iD **must** be registered to the name of an individual to comply with ORCID's Terms and Conditions of Use, which do not permit the use of ORCID iDs by organizations (<u>https://orcid.org/legal</u>). We recommend that this individual is someone directly involved in the publication or production process, such as an editor, publisher, or technical officer.

Public client terms of service

ORCID grants individuals a limited license to use the Public API to: request permission from an ORCID iD holder to receive a verified ORCID iD; read public data from an ORCID record; and search public data in the ORCID Registry. Use of the Public API must comply with the ORCID Public Client Terms of Service

(https://orcid.org/content/orcid-public-client-terms-service).

Limitations of the ORCID Public API

- The Public API can only be used to authenticate ORCID iDs and read public data on ORCID records.
- An individual may only have one Public Client. You may not obtain more than one ORCID iD for the purpose of obtaining multiple Public Clients.
- A Public API client cannot be shared or transferred to another individual. If the
 individual whose iD is being used for this purpose leaves an organization, a new
 individual at the organization must register for a new Public API client for the
 organization to continue to access the public API client benefits. Depending on
 how your system is set up, users may need to authenticate their ORCID iD and/or
 provide permissions twice if the Public API client is changed.
- Support for the Public API is **only** provided via community support at the ORCID API Users Group <u>https://groups.google.com/group/orcid-api-users</u> -- we strongly recommend that all Public API users join this group.

If you require more support, or wish to use additional functionality on the ORCID API (such as adding and updating ORCID records, reading limited access information) please consider becoming a member and using the ORCID Member API.

Step 1. Register an ORCID iD

You can register an ORCID iD at <u>https://orcid.org/register</u>. If you already have an iD, skip to Step 2.

Complete the registration form with your personal information:

- First and last name: This must be the name of an individual
- Primary email: The main email address associated with the account
- Additional email: A secondary email address that can be used to sign into the account or reset its password
- **ORCID password**: A unique password, input twice (note that commonly used passwords are not accepted)
- **Default visibility setting**: For any new information added to the ORCID record. Choose from **Everyone** (visible to the public), **Trusted parties** (limited access, ie, accessible by ORCID members), or **Only me** (private)
- Notification settings: Opt in to receive quarterly notifications from ORCID if wished
- Consent to the terms & conditions of use
- Confirm that you are not a robot

ORCID will check that you don't have an existing account by searching for your email address(es) and name in the ORCID Registry. You can't register for another iD using an email address that is connected with an existing ORCID record. If there is a match on your name, please check the linked ORCID records to see whether any belongs to you. If you aren't certain, contact ORCID with the listed ORCID iDs at

<u>https://orcid.org/help/contact-us</u> for help determining whether an existing account belongs to you. Additional information about registering an iD can be found in the ORCID Knowledge Base: <u>https://support.orcid.org/hc/articles/360006897454</u>

Step 2. Verify your primary email address

If you have an ORCID iD and have already verified your email address, skip to step 3.

Your primary email address must be verified to register a Public API client. Verification is important to let ORCID know that you can be contacted at that address in the event there is an issue with your Public API client. Check your email inbox or spam/junk folder for a message from support@verify.orcid.org, then click the link to verify your email address. If you cannot find the verification message, request another one by clicking the **Verify** link next to your email address in your ORCID account settings.

Step 3. Register your Public API client

1. After verifying your email address, browse to the **Developer Tools** section of your ORCID account.

FOR RESEARCHERS		ERS	FOR ORGANIZATIONS		ABOUT	HELP	SIGN OUT
	MY ORCID RECORD	INBOX	ACCOUNT SETTINGS	DEVEL	OPER TOOLS	LEARN MORE	

You can also access the page directly at https://orcid.org/developer-tools

2. To start the registration process, click the **Register for the free ORCID public API** button.



4. In the form that appears, enter the following values:

Name	Name of the API client. This is the name that researchers will see on the permissions form and in their ORCID account settings. We recommend using the name of the publisher, scholarly society, journal, conference, organization, etc. Examples: Scholarly Publishers, Academic Society, Journal of New Dirigible Studies, International Conference of Studies, New Landia College, Scholarly Foundation	
Website	URL for the homepage of your organization, or the main page or system where researchers will first encounter ORCID, such as the manuscript submission system. Examples: <u>https://www.academicstudies.org</u> <u>https://</u> <system's login="" page=""></system's>	
Description	A brief description of the application displayed in the infortext field when researchers grant your client permission to get their ORCID iD. The description can be in any language so long as the character set is UTF-8. Recommended lengt 300 characters. Example: Academic Society of Studies collects verified ORCID iDs for authors and reviewers using Manuscript Submission System.	

Redirect URIs	These are the locations that your users will be sent to after granting your client permission to get their ORCID iD. Public API applications must have at least one redirect URI registered. URIs must begin with https:// or http://			
	<insert here="" list="" of="" redirect="" required="" uris=""></insert>			
	Add additional URIs by clicking " +Add another redirect URI".			
	Delete URIs by clicking the delete (rubbish bin) icon 💼 next to the input field.			

- 5. Click the **save** icon ⁽¹⁾ at the bottom of the form to generate your API credentials.
- 6. Your API credentials are created. Click **Show Details** to display your Client ID and Client Secret.



7. Your Client ID and Client Secret will be displayed.

Client ID APP-Y44IM47SRGCL84RD

Client secret 61408d6c-5ea8-aed1-4a0b-deb8d0cb1057

8. <Section for Service Providers: Insert here system's instruction to administrator on how to transfer credentials – cut & paste into a specific section of the admin screen, share with service provider agent...>