



IMPLEMENTING ORCID AT YOUR ORGANIZATION

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OUTLINE

- ORCID Implementations
 - Integration with ORCID API
- A Look at Exemplars
- Actions

INTEGRATING WITH ORCID API

WHAAAAA?!?!?



ORCID PROVIDES

- ✓ Plumbing for research information
- ✓ Tools to build trust in digital information



Persistent digital identifiers to distinguish researchers from each other



Member-built integrations that connect researchers and their activities/affiliations



A hub for synchronizing machine-readable connections between identifiers for people, organizations, and research activities



ORCID ENABLES



Organizations use the ORCID API to authenticate, collect, display, and connect persistent identifiers for people, places, and things in research workflows



ORCID REGISTRY CONNECTIONS

Two models:

1. Connect via a vendor system
 - Manuscript submission/publication
 - Document/data repositories
 - Profile systems
 - CRIS systems
2. Develop a custom connection

VENDOR CONNECTIONS

Publishing

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

Document / data repositories

- ePrints
- Hydra/Fedora

Profile systems

- Society to ORCID

CRIS Systems

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



Find more:
<https://members.orcid.org/orcid-enabled-systems>

CUSTOM INTEGRATIONS

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>




GET PERMISSION



ORCID registry depends on user-based permissions:
Can I...

- have your iD (*/authenticate*)   
- read limited-access data on your record (*/read-limited*) 
- interact with the activities on your record (*/activities/update*)  
- interact with your biographical information (*/person/update*)  



Bob Researcher
<http://sandbox.orcid.org/0000-0002-0491-7882>
(Not You?)

ORCID Staff (Member API) 
has asked for the following access to your ORCID Record

Create or update your activities
Read limited information from your record

☒ Allow this permission until I revoke it.
You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Deny [Authorize](#)



Let's simplify...

AUTHENTICATE

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





ORCID

Sofia Garcia
<https://sandbox.orcid.org/0000-0002-7635-015X>
(Not You?)

State University

has asked for the following access to your ORCID Record

Add or update your biographical information
Add or update your research activities
Read your limited-access information

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Authorize

Deny

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/v3.0/\[ORCID iD\]/record](https://api.sandbox.orcid.org/v3.0/[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

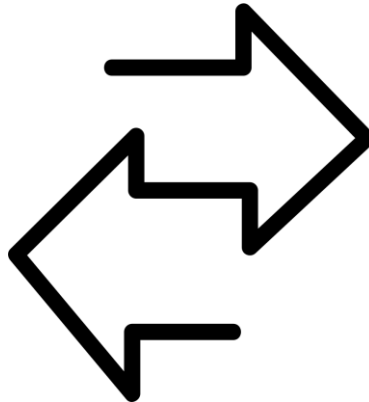
Created

2018-03-22

Source: ORCID University


SYNCHRONIZE

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











**Chieh-Chih Estelle
Cheng**

ORCID iD

 <https://orcid.org/0000-0002-3207-0527>

ORCID API

	Public API	Member API
AUTHENTICATE ORCID iDs with the ORCID API		
DISPLAY iDs you've collected in your system		
COLLECT get data from ORCID*Public API limited to public		
CONNECT add affiliations/contributions	X	
SYNCHRONIZE add data to/get data from ORCID on an ongoing basis	X	

Collect: Publishing

COLLECT & CONNECT WORKFLOW — PUBLISHERS

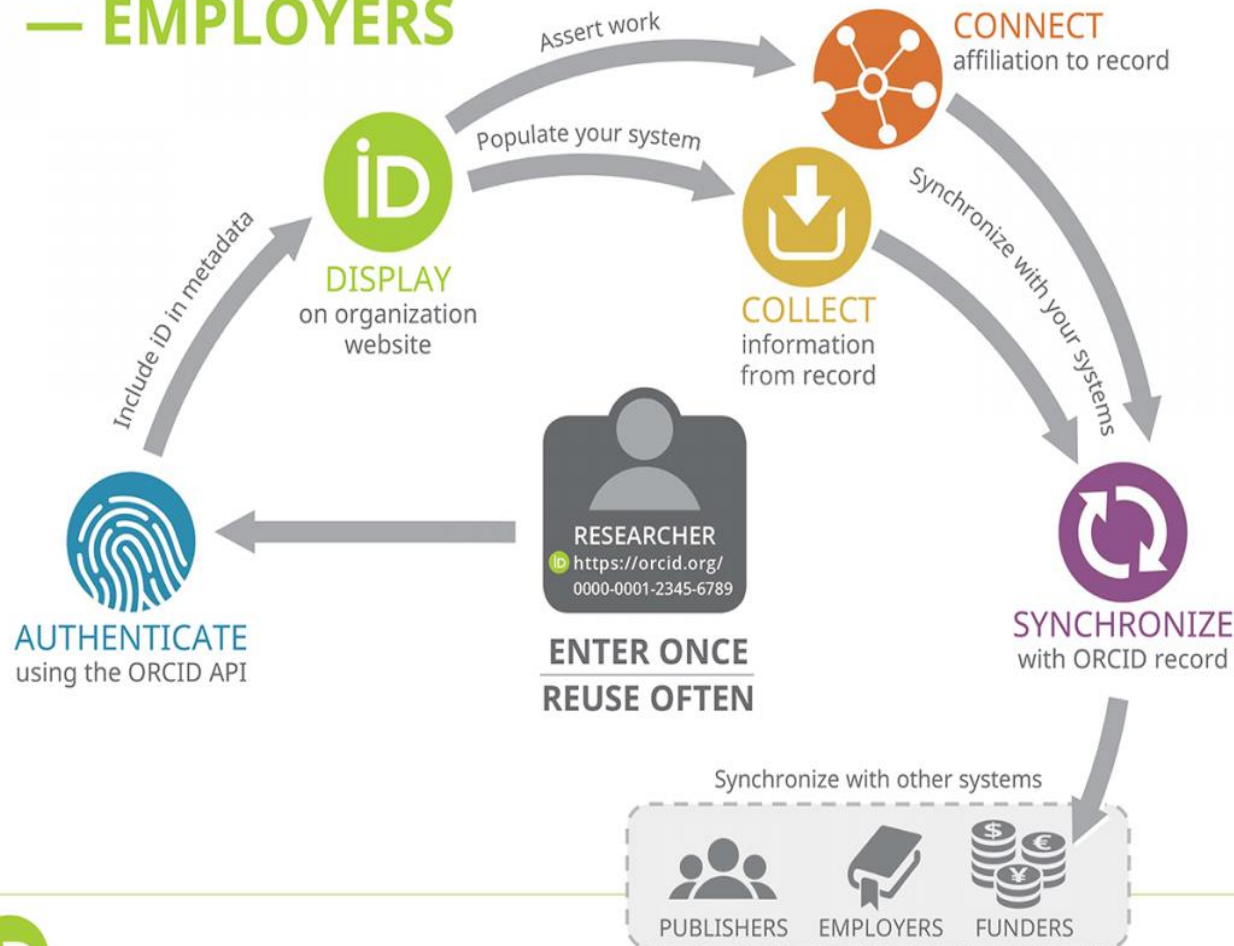


- **Collect** information from researcher' ORCID record to **pre-fill** in your system
- For instance, in publishing workflow, you collect your authors' basic information and pre-fill into your submission system

Collect: Research Institute

COLLECT & CONNECT WORKFLOW

— EMPLOYERS



For instance, in research management workflow, you **collect** information about your researchers' research outputs (e.g., publications) and fill into your system

Connect:Publishing

COLLECT & CONNECT WORKFLOW — PUBLISHERS

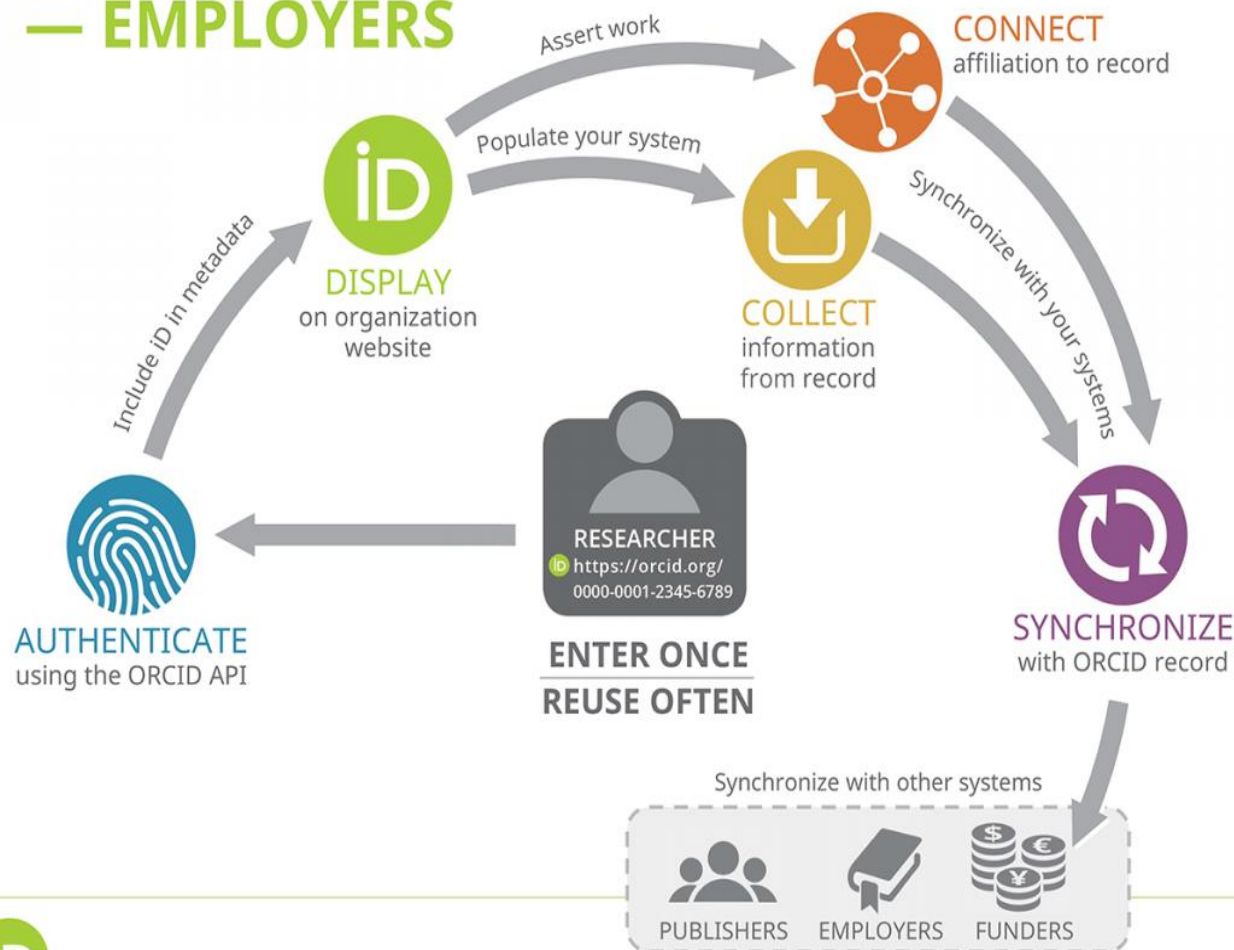


- ORCID members can use the Member API to **connect publication metadata** with ORCID records that will be available to other systems and organizations accessing the records, adding trust and transparency.

Connect: Research Institute

COLLECT & CONNECT WORKFLOW

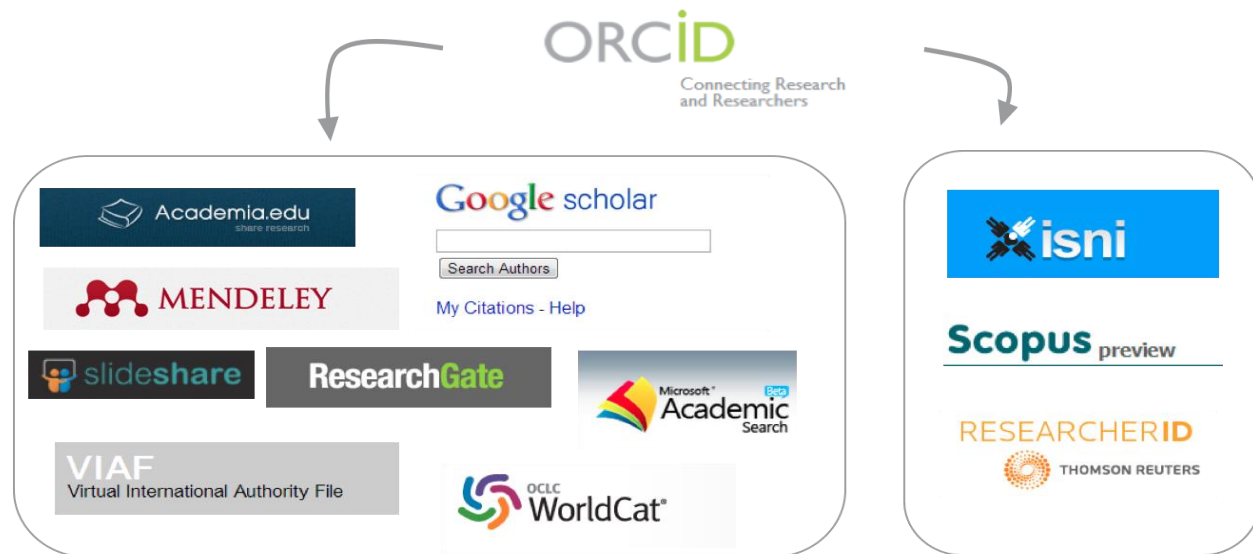
— EMPLOYERS



ORCID members can use the Member API to make assertions about the connections between individuals and your organization with ORCID records

Why Connect?

- Authoritative: Validated data that will flow into any research ecosystem
- Trusted assertion: Improve search and retrieval



IMPACT & ASSESSMENT

Cape Peninsula University of Technology: Cape Town, Western
Cape, ZA

2015-03-01 to present | Professor (Education and Social Sciences)

Employment



Organization identifiers

Ringgold: 70683

Cape Peninsula University of Technology: Cape Town, ZA

Other organization identifiers provided by Ringgold

ISNI: 000000010177134X

OFR: <http://dx.doi.org/10.13039/501100004512>

Data and
rankings



Indexes &
Databases



WEB OF SCIENCE



Affiliation added to
the individual(s)
ORCID iD(s) by the
university system

Publisher
Submission
systems

SCHOLARONE™



A LOOK AT CONNECT EXEMPLARS

Asserting Affiliation

CHIA-LING MEI

ORCID iD

<https://orcid.org/0000-0002-8289-5746>

 Print view 

Also known as

梅家玲

Websites

[link1](#)

[NTU Researcher Profile](#)

▼ Employment (7)

↑↓ Sort

National Taiwan University: Taipei, TW

2015-08 to present | Professor (Department of Chinese Literature)

Employment

Source: National Taiwan University

★ Preferred source

National Taiwan University: Taipei, TW

2004-08 to 2015-08 | Professor (The Graduate Institute of Taiwan Literature)

Employment

Source: National Taiwan University

★ Preferred source

CHUN-I CHEN

ORCID iD

<https://orcid.org/0000-0002-0141-7954>

 Print view 

Also known as

陳純一

Websites

[NCCU Academic Hub](#)

▼ Employment (3)

↑↓ Sort

National Chengchi University Department of Diplomacy:
Taipei, TW

| Professor

Employment

Source: National Chengchi University 國立政治大學

★ Preferred source

National Chengchi University Department of Diplomacy:
Taipei, TW

2011-02-01 to 2013-01-01 | Professor

Employment

Connecting Other Identifiers

Rongquan Lai

ORCID iD

 <https://orcid.org/0000-0003-3701-7183>

 打印视图 

网站

Curriculum Vitae
Mendeley profile

国家/地区

中国

关键字

Biodiversity Manipulation and Pest
Management; Ecological Control of
Tobacco Pests

其他 ID


eScientist: 0000-0003-3701-7183

电子邮件地址

lrq305@sina.com

Yoshikuni Ono

ORCID iD

 <https://orcid.org/0000-0002-9222-4014>

 打印视图 

网站

<http://www.umich.edu/~onoy/>

国家/地区

日本

其他 ID

Scopus Author ID: 55091186500

Researcher Name Resolver ID:
1000070598664

ACTIONS



ORCID Integration Workflow

1. Test in the sandbox environment.

- To obtain Sandbox Public API credentials, register for a Sandbox ORCID iD, sign into your Sandbox ORCID record, go to the “Developer tools” tab, and complete [the form](#).
- To obtain Sandbox Member API credentials complete [the form](#)

ORCID Integration Workflow

2. Make your integrations live

- To obtain Production Public API credentials, sign in to your ORCID record, go to the “Developer tools” tab, and complete [the form](#)
- To obtain Production Member API credentials, ORCID membership is mandatory. And organizations need to provide a demo of the plugin working in the Sandbox environment to ensure they follow the best practices

Take Actions

- Publisher: signing [the publishers open letter](#)
- Funder: [singing the funder open letter](#)
- [Integrating with ORCID](#)
- Making the most of ORCID by following [Collect & Connect Best Practices](#)

Webinars and resources

Webinars: <https://orcid.org/about/events>

Knowledge Base: <https://support.orcid.org/hc/en-us>

Integrations

Getting Started

<https://members.orcid.org/api/getting-started>

<https://orcid.github.io/orcid-api-tutorial/>

Case examples:

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

Code examples:

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



THANK YOU...



Find out more at <https://orcid.org>

Register at <https://orcid.org/register>

Email e.cheng@orcid.org / c.lu@orcid.org

Twitter [@ORCID_Org](https://twitter.com/ORCID_Org)

