

IMPLEMENTATION OF ORCID AND UNDERSTANDING THE API

OCTOBER 2018 | TAIWAN WORKSHOP



Connecting Research
and Researchers

CHIEH-CHIH ESTELLE CHENG

Engagement APAC

e.cheng@orcid.org | <https://orcid.org/0000-0002-3207-0527>

ORCID.org

OUTLINE

- ORCID Implementations
 - Integrating with ORCID API
 - Engaging Communities
 - Research Institutions
 - Funders
- A Look at Exemplars
- Actions

ORCID IMPLEMENTATIONS

WHAAAAA?!?!?



ORCID IMPLEMENTATIONS

Integrating with ORCID
API

Engaging Communities

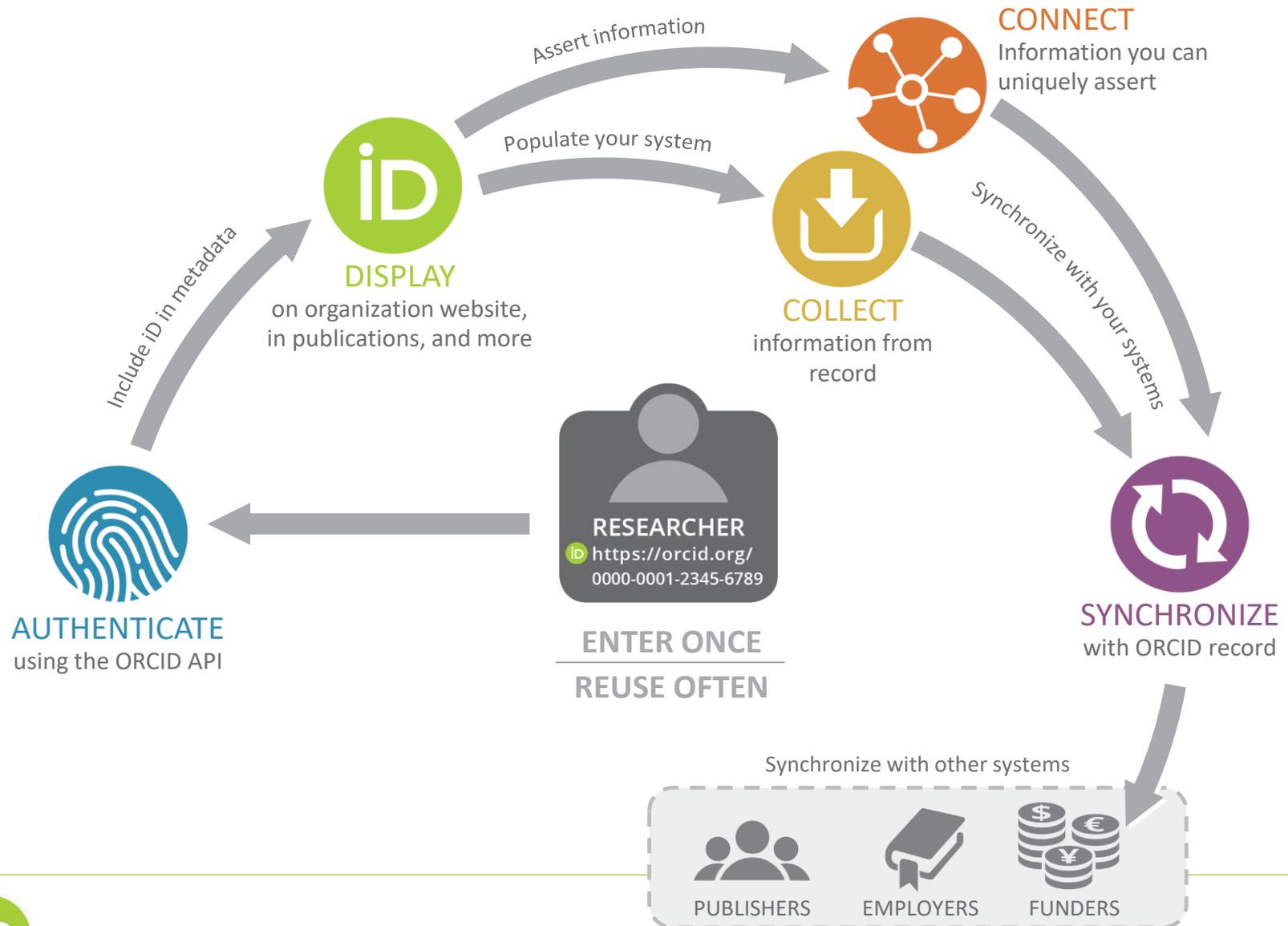
ORCID ENABLES



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



COLLECT & CONNECT



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/0000-0001-9151-9151>

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

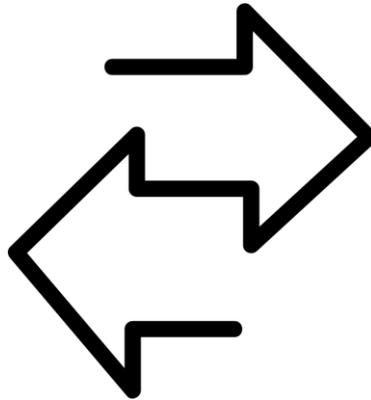
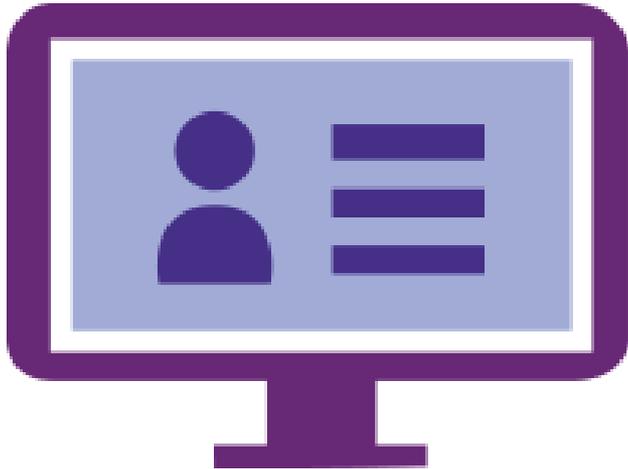
Created

2018-03-22

Source: ORCID University

SYNCHRONIZE

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



Matthew Buys

ORCID ID

 <https://orcid.org/0000-0001-7234-3684>

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

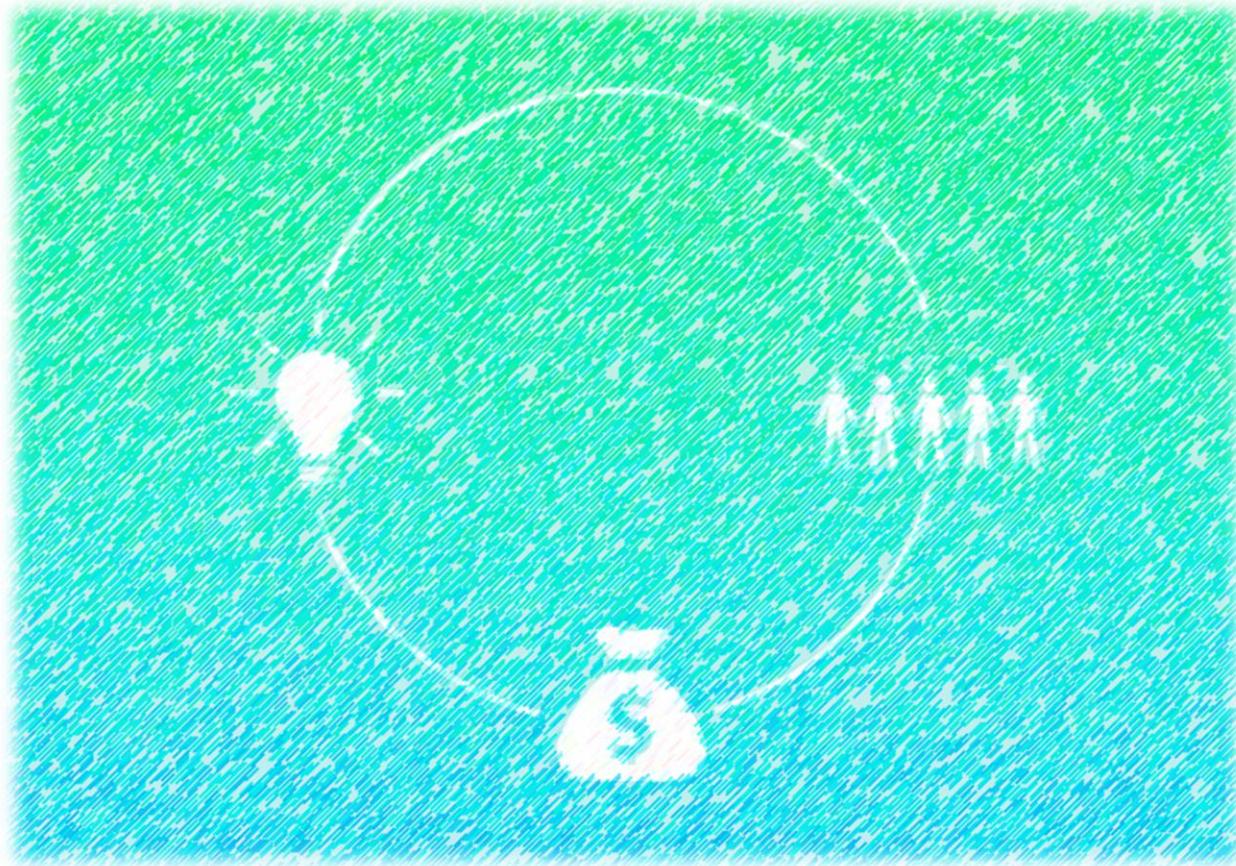
- Fine-tuned control & permissions
- Customized buttons, user flows, feedback
- Test & troubleshoot with ORCID team

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

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



ENGAGING COMMUNITIES



https://thebusiness.blog.hu/2017/06/15/hogyan_keres_3_millio_forintot_egy_blogger_egy_orult_ot_let_segitsegevel

ENGAGING Research Institutions

WHO? Researchers

Technically, integrating ORCID involves adding <person ID> and <source> fields to data models

Socially, it is critical that researchers are engaged in the process.



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)



ENGAGING FUNDERS

- Streamline application process by pulling information from ORCID
- Ensure accurate citation of award (both grant numbers and organization name) by pushing award information into ORCID record
- Enable real-time reporting by using ORCID notification API
- Recognize your reviewers, too!

ORCID

Reducing

Burden and

Improving

Transparency

Funder Working Group

- Australian Research Council
- BBSRC (UK)
- CAPES (Brazil)
- HHMI (US)
- JST (Japan)
- CONCYTEC (Peru)
- MBIE (NZ)
- NSERC (Canada)
- SNF (Switzerland)
- NIH (US)
- Wellcome Trust (UK)



<https://orcid.org/about/community/working-group/funders>

GOALS

- Collect iDs from applicants and reviewers
- Request read/write/update permissions
- Read information from ORCID record to populate standard application fields
- Update record when grant awarded
- Use notification API to receive information on research activities

CONNECTED FUNDING

- When funders push successful grant awards to the ORCID registry, it is available for easier funding acknowledgements

Molly Losh

ORCID ID

 orcid.org/0000-0002-9823-8249

 Print view 

▼ Funding (1)

Sort

Characterizing the Language Endophenotype in Autism:
Longitudinal, Genetic, and Neuropsychological Correlates
Autism Speaks (New York, NY, United States)

2008-08 | Award

Award: 1377

Alternate URL: science.grants.autismspeaks.org/search/grants/characterizing-language-endophe...

Source: Autism Speaks Grants System

 Preferred source



A LOOK AT EXEMPLARS



RESEARCH INSTITUTION

ORCID at KAUST

KAUST uses ORCID identifiers to identify researchers and their research. Select from the options below before connecting to the ORCID system.

- Create a new ORCID ID or identify an existing one (required).
- Read information from my ORCID record.**
- Add KAUST affiliation to my ORCID record.**
- Add publications from the KAUST Repository to my ORCID record.**

You can change these permissions at any time in the Accounts Settings section of your ORCID record.

Connect with ORCID

- Custom DSpace integration
- KAUST COLLECTS permissions
- CONNECTS works in IR to the ORCID record
- CONNECTS KAUST affiliation to the ORCID record
- Track ORCID uptake via dashboard



FUNDER

- proposalCENTRAL

- An e-grantmaking website shared by many government, non-profit, and private grant-making organizations.



Making the world a brighter place, one idea at a time.

APPLICATION LOGIN

[Forgot Your Username/Password?](#)

LOGIN

 LOGIN using ORCID 

[Need an account?](#)

CREATE ONE NOW!

ORCID

Chieh-Chih Estelle Cheng
<https://orcid.org/0000-0002-3207-0527>

[\(Not You?\)](#)

proposalCENTRAL 

has asked for the following access to your ORCID Record



Get your ORCID iD

This application will not be able to see your ORCID password or any other information in your ORCID record with visibility set to Only me. You can manage permission granted to this and other Trusted Organizations in your [account settings](#).

Authorize

Deny



ACTIONS



NEXT STEP

- We would like you to consider integrating with ORCID in your workflow
- We encourage you to start collect & connect program and ask us questions
- We welcome any interested funders to participate in the ORBIT working group
- We value your recommendations for funders and grant management systems we should be engaging in ORBIT pathfinder projects



RESOURCES

Member Support Centre: Collect & Connect, resources

<https://members.orcid.org>

<https://members.orcid.org/outreach-resource>

API documentation, tutorials, sample workflows

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

API XSD, example calls and XML (Github)

<https://git.io/vDRy0>

ORCID API users listserv

<https://groups.google.com/group/orcid-api-users>

ORCID Video resources

<https://vimeo.com/orcidvideos>

Bootcamp: ORCID API (Searches, OAuth, create on demand)

<https://orcid.github.io/niso-workshop-2017>

Questions?

support@orcid.org

<https://support.orcid.org>

