



# 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

**WHAAAA?!?!?**



# 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



# 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

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### Organization identifiers

Ringgold: 385488

ORCID: Bethesda, MD, US

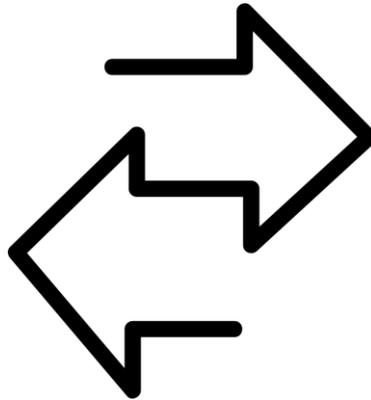
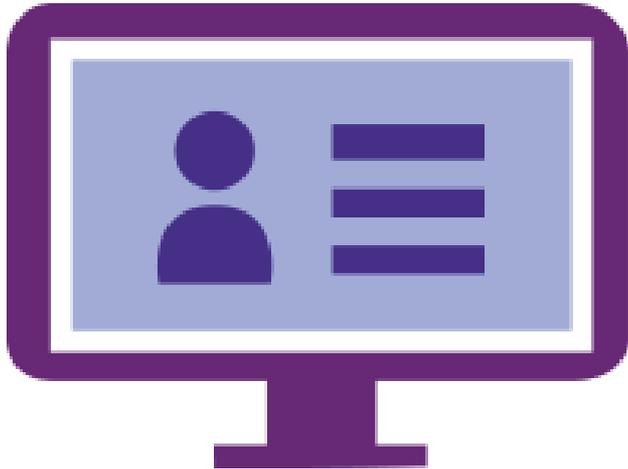
### Created

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

# Collect: Publishing

## COLLECT & CONNECT WORKFLOW — PUBLISHERS

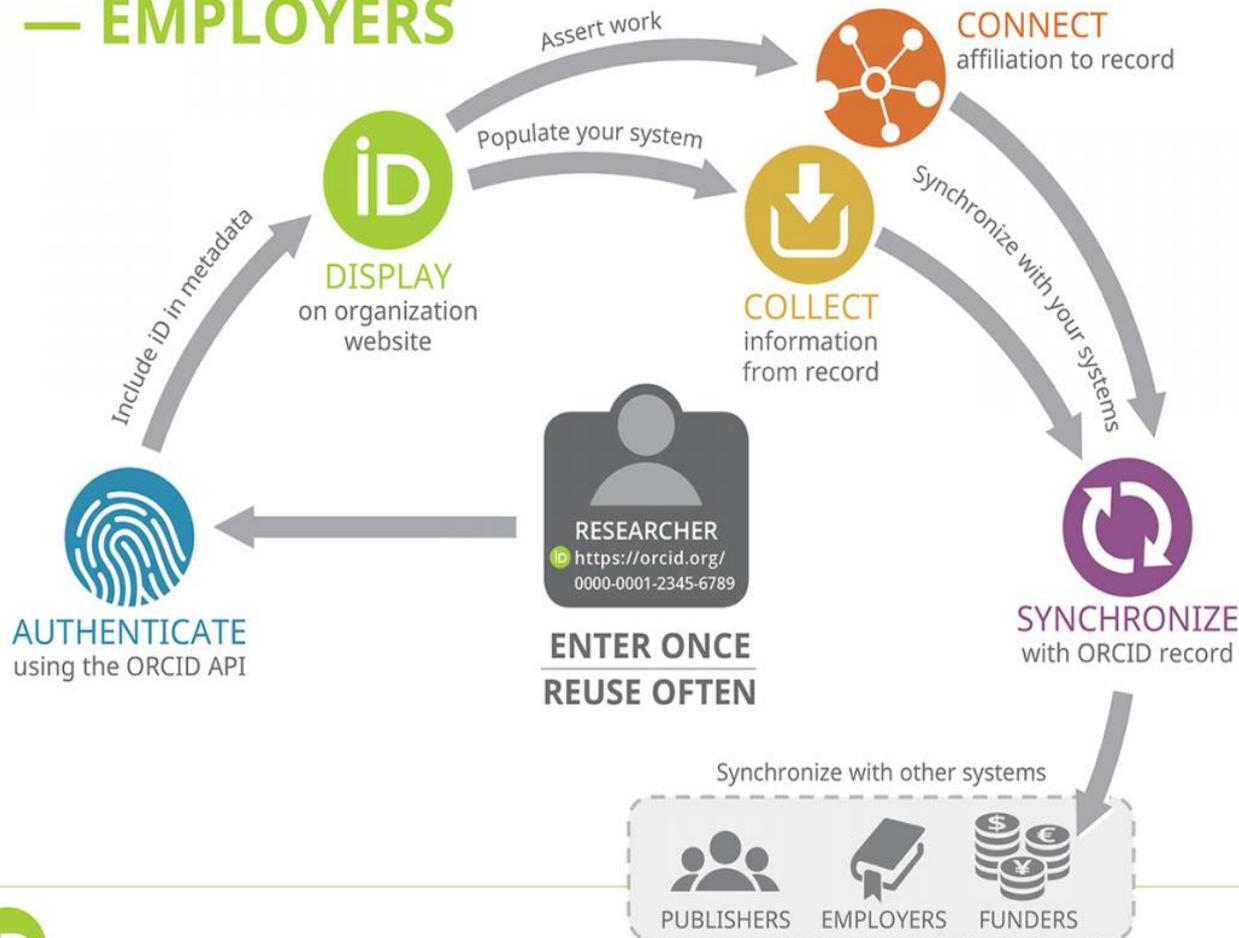


- **Collect** information from researcher' ORCID record to **pre-fill** in your system
- For instance, in publishing workflow, you collect your authors' basic information and pre-fill into your submission system

# 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

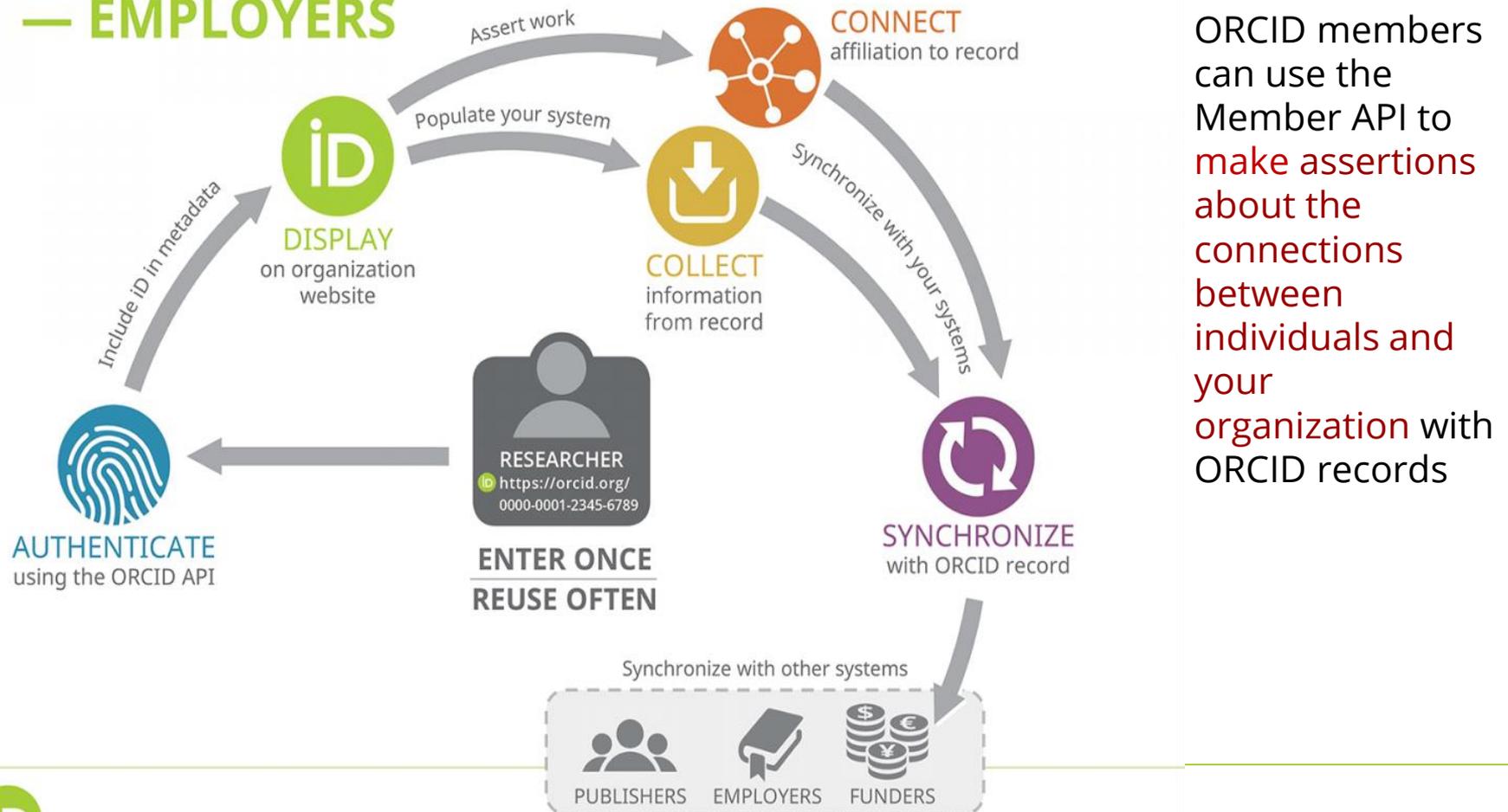


- ORCID members can use the Member API to **connect publication metadata** with ORCID records that will be available to other systems and organizations accessing the records, adding trust and transparency.

# Connect: Research Institute

## COLLECT & CONNECT WORKFLOW

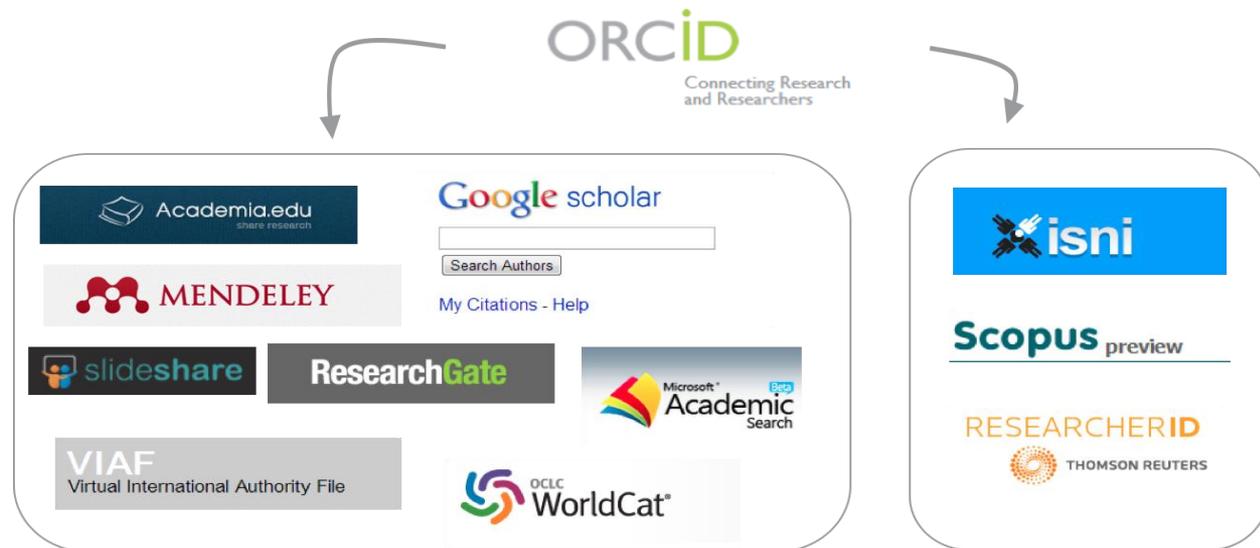
### — EMPLOYERS



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

Publisher  
Submission  
systems

SCHOLARONE™

OJS  
OPEN JOURNAL SYSTEMS

eJournalPress



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



A background image featuring a complex network diagram with numerous nodes and connecting lines, rendered in a light gray color against a dark gray background. The network structure is dense and interconnected, with lines forming various geometric shapes like triangles and polygons.

# 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](mailto:e.cheng@orcid.org) / [c.lu@orcid.org](mailto:c.lu@orcid.org)

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