

# **DSpace-CRIS & ORCID**

**ORCID-Austria Online Tech-Workshop** 

25.11.2020





## About me & 4Science



#### Andrea Bollini, CTO at 4Science

DSpace committer (involved since v. 1.2), Open Source enthusiast, contributor of Dataverse, DuraCloud, OJS and other projects Member of the Working Group of COAR Next Generation Repository Deputy leader of the euroCRIS CERIF TG for CRIS Architecture Technical Leader of the ORCID Italian Consortium in 2015-2016 Leader of the DSpace 7 REST team Started DSpace-CRIS back in 2009, open sourced in 2013





The first open source CRIS system

More than 100 installations Worldwide, in all continents!

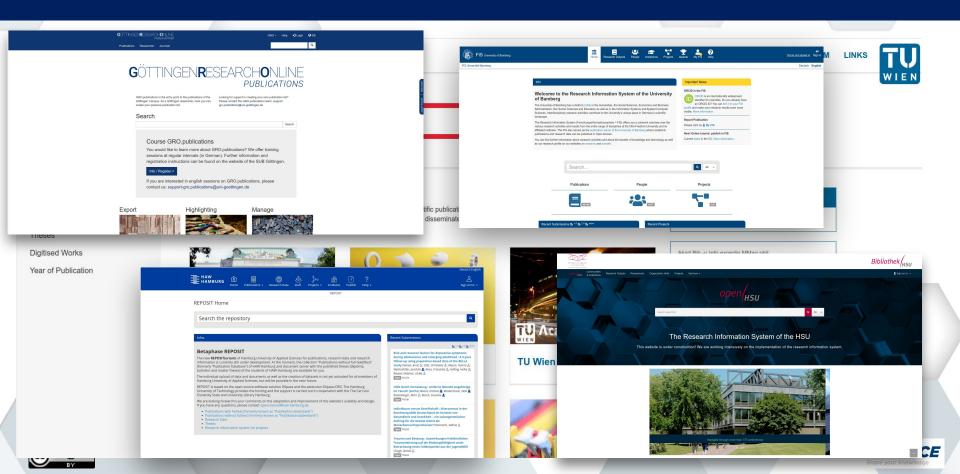
A large community of German speaking users in Austria, Switzerland, Germany

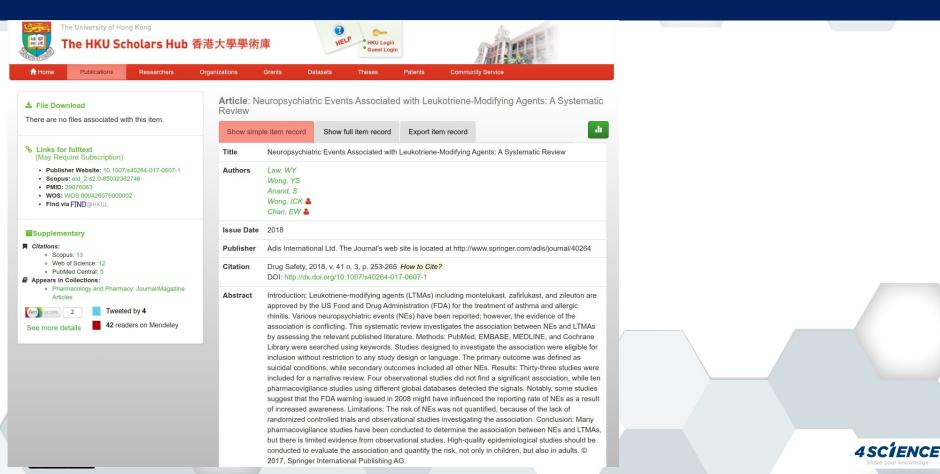
Discussed at DSpace Anwendertreffen since 2017



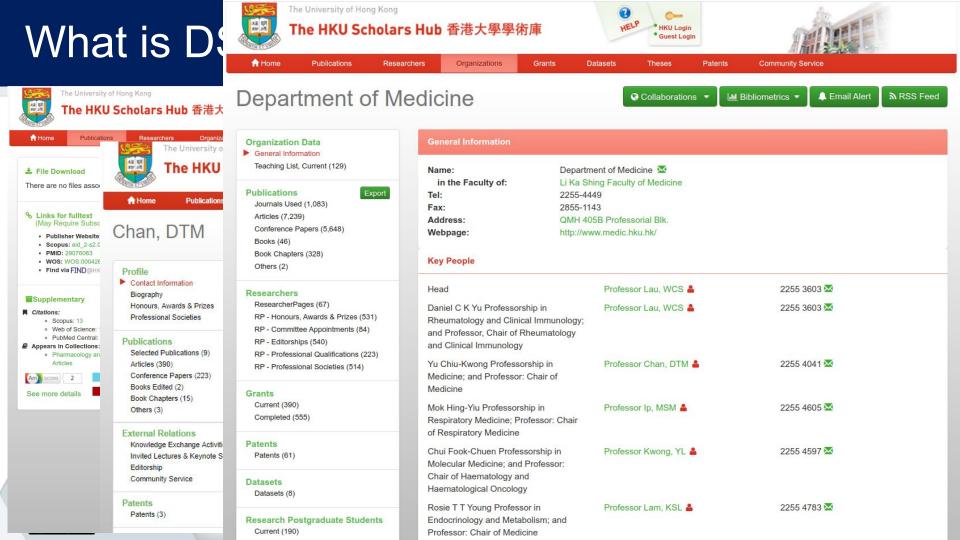


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## **DSpace-CRIS & ORCID Integration**

Full integration already available in the current version and ongoing for the next DSpace-CRIS 7

Based on the ORCID v3 API

Verified and approved by the ORCID Support Team (of course it needs organisational best practices in place as well)





Get your application credentials: Public, Member, Premium API are all supported





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		MY ORCID F		English	
Registry 🗸	Search				0

FOR RESEARCHERS	FOR ORGANIZATIONS	ABOUT	HELP	

FUNDERS PUBLISHERS RESEARCH ORGANIZATIONS OUTREACH RESOURCES INTEGRATE WITH THE ORCID API

THE ORCID API

REGISTER A CLIENT APPLICATION

#### Sandbox Member API

The Sandbox Member API allows organizations to test Member API functions without affecting production records. Membership is not required in order to access the Sandbox Member API.

Access to any of the ORCID APIs requires a set of credentials consisting of a Client ID and a Client Secret. To register for API credentials, please choose the applicable API from the list below, or learn more about the differences between the Member and Public APIs

Note: The Sandbox is not connected to the production ORCID registry and no information is shared between the two systems, however, the Sandbox has identical functionality, with the exception of the behavior of emails, and connections outside systems. Learn more about the sandbox environment.

#### Production Member API

If you are an ORCID member, please use this option to register for Production Member API credentials. Not a member? Learn more about ORCID membership.

#### Public API

The Public API allows organizations that are not ORCID members to access a limit set of API features, including authenticating users' ORCID IDs and retrieving publicly-visible information from the ORCID registry.

#### **Register a client application: Sandbox Member API**

To access the Sandbox Member API service, please enter the following information about your client application and your organization. If you are a member and need to request Production Member API credentials, please fill out the Production Member API application form.

Note: This process is not fully automated. There may be a delay before we respond to you with credentials after you complete this form. Stay in touch! Join our ORCID API Users mailing list to learn the latest updates about the ORCID API.

#### **General Information**

Registration for the development sandbox service is open to anyone. For more information about credentials and how to complete this form see the Register a Client Application article.

#### Update existing credentials?

ONo

×

OYes

#### Note to ORCID staff

Use this field to let us know if you're using a vendor system, include additional redirect URIs, or if there is anything else you'd like to communicate to the ORCID team.

#### Email address \*

Please enter a valid email address to enable us to correspond regarding your request. This cannot be a mailinator email address.

#### Your name

#### Name of your organization \*



#### **Credential Type**

In the production registry, the API features that members have access to are determined by their membership level. While ORCID membership isn't required in order to access the Sandbox. Sandbox credentials can be set to reflect the API features available at different membership levels.





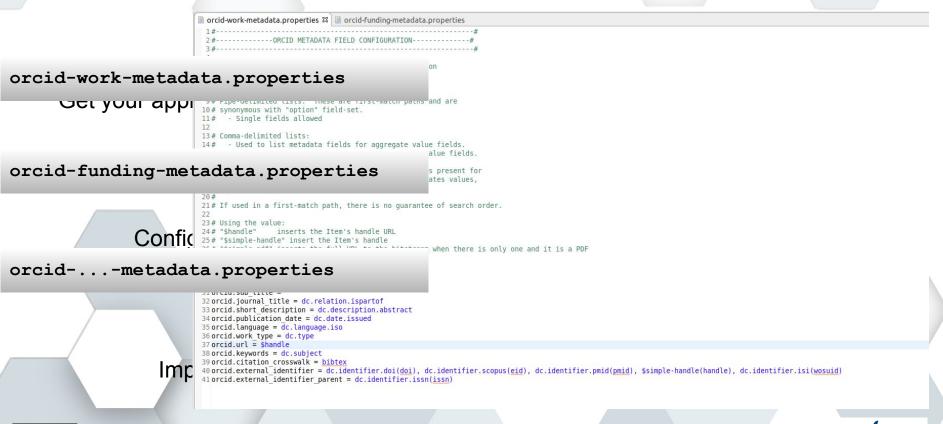
Get your application credentials: Public, Member, Premium API are all supported

Configure your DSpace-CRIS to use the right API, credentials, scopes





190 ####################################			
191 # ORCID			
193 #Production F			
194 #Step	Member API	Public API	
195#	https://orcid.org/oauth/authorize https://orcid.org/oauth/token https://api.orcid.org/v3.0	<pre>https://orcid.org/oauth/authorize https://orcid.org/oauth/token https://pub.orcid.org/v3.0</pre>	
199 # 200 # 201 #Sandbox			uild.properties
202 #Step	Member API	Public API	
203 # 204 #Authorize   205 #Exchange   206 #Use   207 #	https://sandbox.orcid.org/oauth/authorize https://sandbox.orcid.org/oauth/token https://api.sandbox.orcid.org/v3.0	https://sandbox.orcid.org/oauth/aut https://sandbox.orcid.org/oauth/tok https://pub.sandbox.orcid.org/v3.0	
211 212# set to all 213 authenticatic 214# put a rando 215 authenticatic	on-oauth.application-authorize-url = https:// or connected if you want to enabled webhook on-oauth.orcid-webhook=none om string here on-oauth.orcid-webhook.secret=xxxxxxxxx		
218 # IMPORTANT!! 219 authenticatic 220 authenticatic	<pre>or free on ORCID to use an institutional Publ. Please fill authentication-oauth.application on-oauth.application-client-name = on-oauth.application-client-id = on-oauth.application-client-secret =</pre>		red into orcid registries (I
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225 authenticatio	on-oauth.application-client-scope =/authentic MEMBER API the suggested scopes are as foll		





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<pre>0 booktitle = {@dc.relation.ispartofbook@},</pre>	
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Get your application credentials: Public, Member, Premium API are all supported

Configure your DSpace-CRIS to use the right API and credentials

Improve the configuration to reflect change to your metadata





Authorization token and preferences are stored in the Researcher Profile properties (metadata)

The application listens for changes related to objects that could be synchronized with ORCID, changes are filtered out depending on the preferences and stored in a processing queue (backend by a database table)

The application uses

- the client application credential to retrieve generic data from ORCID (such as lookup author names, import publications by others, improve researchers' profiles, etc.)
- the researcher authorization token to query for their related information so to possibly show / import also information reserved to trusted parties





#### Authentication

#### Login using the ORCID Credentials can be enabled / disabled

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#### Log In to DSpace

New user? Click here to register.	
Please enter your e-mail address and pass	word into the form below.
E-mail Address:	
Password:	
Have you forgotten you	r password? Log In

#### Use your ORCID or create a new one

ORCID provides a persistent digital identifier that distinguishes you from every other researcher and, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between you and your professional activities ensuring that your work is recognized.

Click on the ORCID logo to signin with your existent record or create a new one.







## Link a local profile to ORCID

The researcher can connect their local profile with ORCID or create a new one. This is the only way to get an ORCID, it cannot be input manually!



### Link a local profile to ORCID - 2

# Connected profile shows the granted authorization and provides instruction / option to disconnect

Granted authorizations	
Granted authorizations Missing authorizations	
C Get your ORCID iD Read your limited-access information Add or update your biographical information Add or update your research activities	
If you need to remove your ORCID, please contact the repository administrator	



## Link a local profile to ORCID

During the submission process a librarian can identify the authors in the ORCID registry or the system can use the information if provided by the external datasource (pubmed, scopus, etc.)

Authors	Westgard, Joshua	Q 🗂 Remove Entry	
	Author Department		
		Q	
Authors		DSpace-CRIS DEMO: DSpace Value Lookup - Google Chrome 🛛 🖨 🕲 😣	
	Author Department	■ dspace-cris.4science.it/tools/lookup.jsp?field=dc_contributor_author&formID=ed Q	
		Author lookup - Internal directory & ORCID	
		Results 1 to 2 of 2 for "Westgard, Joshua"	
Enter the main title of the item.		results 1 to 2 of 2 for Westgald, Joshua	
Title *	Free World Cities Database	Westgard, Joshua(0000-0001-8169-3977)	
If the item has any alternative tit	los plasse enter them have	Local value 'Westgard, Joshua' (not in Naming Authority)	
Other Titles	les, please enter them here.		
Please give the date of previous	s publication or public distribution. You can leave out t	hr,	
Date of Issue *	Month: (No Month)		
	of the previously issued instance of this item.	2. Westgard, Joshua	
Publisher		Name in "Last, First" format	
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Citation		Accept See More Results Cancel	
			4SCIENCE
Enter the series and number as	signed to this item by your community.		Share your knowledge

#### Display of the ORCID Badge TUHH open research

#### Not authenticated ORCID

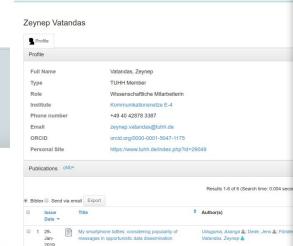
Home Publications - Staff - Institutes Help - Publish

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2018





Modeling of Data Dissemination in OppNets

Vatandas, Zevnep 🌲 Hamm, Sascha Marc

	f - Institutes Help - Publish
Zeynep Vatandas	
S Profile	
Profile	
Full Name	Vatandas, Zeynep
Туре	TUHH Member
Role	Wissenschaftliche Mitarbeiterin
Institute	Kommunikationsnetze E-4
Phone number	+49 40 42878 3387
Email	zevnen valandas@luhh.do
ORCID	orcid.org/0000-0001-5047-1175
	https://www.tubh.de/index.pnp?id=29049

## Display of the ORC

	Technische Universität		Search the repository
	Home Publication	s - Staff - Institutes Help - Publish	
Authenticated ORCID	Please use this ide	ntifier to cite or link to this item: https://doi.org/10.15480/882.2052	
TUHH open research Search the repository	8	<b>⊕</b>	
Home Publications - Staff - Institutes Help - Publish	Publisher DOI:	10.3390/fi11020029	
Prof. DrIng. Andreas Timm-Giel	Title:	My smartphone tattles: considering popularity of messages in opportunistic data dissemination	
Profile  Profile	Language:	English	
Authenticated	Authors:	Udugama, Asanga 🚢 Dede, Jens 🐁 Förster, Anna 💩 Kuladinithi, Koojana 💩 Timm-Giel, Andreas 🍇 🌀 Vatandas, Zeynep 🛔	
Full Name Timm-Giel, Andreas	Keywords:	opportunistic networking;popularity;OMNeT++;OPS;organic data dissemination;Keetchi;Epidemic	
Type         TUHH Member           Role         Leitung	Issue Date:	29-Jan-2019	
Institute Kommunikationsnetze E-4	Publisher:	MDPI	
Phone number +49 40 42878 3049 Email limm-gel@tuhh.de	Source:	Future Internet 2 (11): 29 (2019-01-29)	
ORCID         © orcid.org/0000-0002-5989-6113           Personal Site         http://www.tubh.de/comnets           Scopus Author ID         6506281575           Publications         (Al)*	Show/Hide filt	ers v	
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Initialize new local profiles upon login and user request;

Create a local profile for identified authors;

Update local profiles with ORCID: academic society, thematic repository or track progress of former PhD students, etc.





## Import publication from ORCID

ill in publication identifiers (DOI is pre	ferable) and then press "Search". A list of all matching publications will be shown to you to select in order to proceed with the submission	
rocess.		
PubMed ID:	Pub Red SCOPUS	
e.g. 20524090		
OOI (Digital Object Identifier) :		
.g. 10.1021/ac0354342		
COPUS ID:	SCOPUS	
.g. 2-s2.0-0000000117		
VOS ID:	() where water	
.g. WOS:000270372400005		
DRCID ID:	(D)	
.g. 0000-0002-9029-1854	0000-0002-9029-1854	
rXiv ID:	atyred () England	
.g. arXiv:1302.1497		
CINII NAID:	CiNii	



## Import publication from ORCID

1

Bollini, A. 2006	
See details & import the record	
Guia de instalação DSpace-CRIS	
Lucas Ângelo da Silveira, Milton Shintaku, Andrea Bollini 2016	
See details & import the record	
D SCOPUS Publication metadata in CERIF: Inspiration by FRBR	
Dvořák, J., Drobíkova, B., Bollini, A.	
2014	
See details & import the record	
D SCOPUS	
DSpace-CRIS@HKU: Achieving visibility with a CERIF compliant open source system	
Palmer, D.T., Bollini, A., Mornati, S., Mennielli, M. 2014	
See details & import the record	

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### Premium API - webhooks

# To be automatically notified about changes in ORCID profiles of their interest.

**DSpace-CRIS at My University** Pascarelli Andrea C Edit Researcher Page O Network Lab **Jul View Statistics** Remove Alert RSS Feed Ø-Found 4 record/records from Orcid Profile ORCID Indicators Other Profile Credit Name Pascarelli Andrea Full Name Pascarelli, Luigi Andrea Email I.pascarelli@mailinator.com ORCID Lorem Ipsum dicit 0000-0001-9753-8285 Biography

### Premium API - webhooks

#### The researcher can complete the import or discard suggestions

#### Choose record to import

Import/Reject suggested rows found in the external database

Show 10 - entries

Select all items	Select none	
Search:		

Next

	Issue Date	Title ⊥↑	Author(s)
O	2015;	DSpace-CRIS Tutorial;	Andrea Bollini; Pascarelli, Luigi Andrea; Palmer, David;
O	2016;	DSpace-CRIS 5 Technical documentation;	Andrea Bollini; Pascarelli, Luigi Andrea;
	2016;	DSpace-CRIS 5 Technical documentation;	Andrea Bollini; Pascarelli, Luigi Andrea;
D	2016;	Example of XLS to import events into repository;	Pascarelli, Luigi Andrea;

Showing 1 to 4 of 4 entries

Cancel	Import





## Push information to ORCID

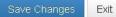
ORCID Synchronization settings			
Publications Preferences Send all publications	Projects Preferences Disabled	Profile Preferences	Person data including employment and education
ORCID Registry Queue The batch system in the next run will send the for	llow data to the Oreid Registry		Fundings
Show 10 💌 entries		Search:	Works
Pascarelli, Andrea     This is a test case for ORCID claim		Send	PUT codes are stored to manage
Showing 1 to 3 of 3 entries		Send Previous Next	updates

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## **Researcher Synchronization preferences**

Synchronization mode		
Enable "Manual" Synchronization Mode to disal	ble batch synchronization, so you must send your data	to Orcid Registry <b>manually</b>
Synchronization mode Batch		
Batch		
Publications Preferences Manual	Projects Preferences	Profile Preferences
Manual		
Choose your preference for publications	Chaose your preference for projects	Choose your preference for profile
Manual		

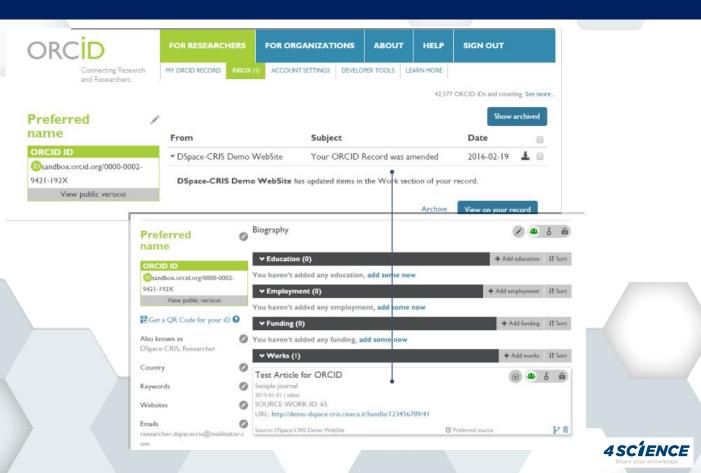


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## Link a local profile to ORCID

Work has structured data including SELF and PART identifiers and a BibTeX representation as citation





## Include IDs in machine readable outputs



OpenAIRE

ORCID IDs can be included in any format exposed over OAI-PMH

DSpace-CRIS supports out-of-box the following guidelines where the ORCID IDs are exposed:

- Guidelines for Data Archives (based on DataCite schema v4)
- Guidelines for CRIS Managers (based on CERIF)

Guidelines for Literature Repository v4 can be supported via configuration

Signposting is an approach to make the scholarly web more friendly to machines, exposing relations as Typed Links in HTTP Link headers





## DSpace-CRIS 7: Ready to use, out-of-box

#### Default data model based on OpenAIRE information space and CRIS guidelines

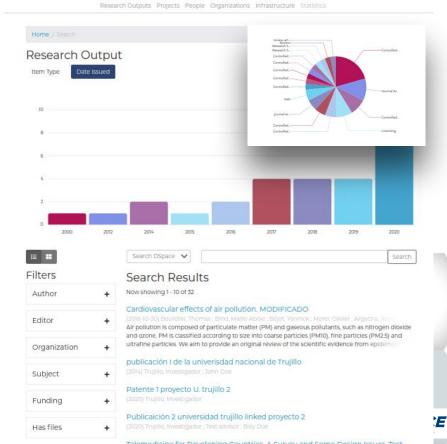
#### Support for real CRIS workflows and use cases

- Full ORCID integration (pull & push)
- Profile (self)management and curation, CV export
- data quality checks & tools: deduplication, publications claim/unclaim, publication-patent-project lookup
- fine-grain security

Easy to maintain, most frequent administrative tasks can be performed via UI

#### Modern UX, full REST API backend





## DSpace-CRIS 7: Ready to use, out-of-box

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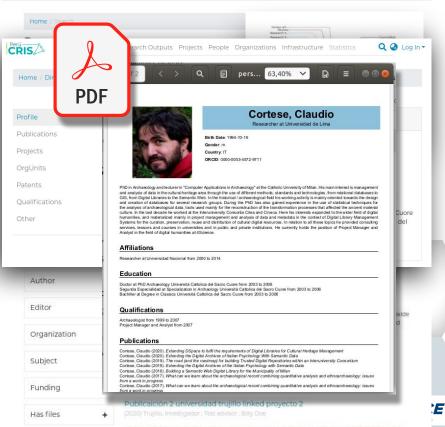
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## **Complete ORCID integration**







Profile	3
Publications	ORCID Authorizations
Projects	
Secured Tab	No ORCID iD associated yet
ORCID	Connect to ORCID ID
Other	

3		
Profile		
Preferred name ORCID	Demo Site Administrator 0000-0002-8310-6788	
	Profile	Profile Preferred name Demo Site Administrator

Granted authorizations

- Get your ORCID iD
- Read your information with visibility set to Trusted Parties
- Add/update your research activities
- Add/update other information about you

Missing authorizations

Great! This box is empty, so you have granted all access rights to use all functions offers by your institution.

If you need to remove your ORCID, please contact the repository administrator

#### **ORCID** Authorizations

Granted authorizations

- · Get your ORCID iD
- Add/update your research activities
- Add/update other information about you

#### Missing authorizations

The following authorizations are missing:

 Read your information with visibility set to Trusted Parties

If you need to remove your ORCID, please contact the repository administrator

ORCID	Synchro	nization	settings

Enable 'Manual' Synchronization mode to disable batch synchronization, so you must send your data to ORCID Registry manually

ynchronization mode		
Manual		
ublication preferences	Project preferences	Profile preferences
<ul><li>Disabled</li><li>All publications</li></ul>	<ul><li>Disabled</li><li>All projects</li></ul>	<ul><li>Affiliation</li><li>Education</li></ul>
<ul><li>Selected publications</li><li>My publications</li></ul>	<ul> <li>Selected projects</li> <li>My projects</li> </ul>	<ul><li>Bibliographic data</li><li>Identifiers</li></ul>

#### **ORCID Registry Queue** Now showing 1 - 4 of 4 Name The psychology of human thought Delete . Demo Site Administrator Delete Ξ The Pythagorean theorem journal-article HANDLE: http://localhost:4000/handle/123456789/717 DOI: 10.1016/j.procs.2014.06.008 2 1 Source: DSpaceCris7 \* Preferred source

### Thank you for your attention!

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