



ORCID: a look back to 2020 and goals for 2021

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Introduction

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- Joined ORCID in March 2020
- Currently working with ORCID consortia in Austria, Brazil, Germany, Ireland, Italy, Norway, UK and USA (Lyrasis).

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Agenda

- ORCID Certified Services Providers
- Member and Consortium reporting
- CRediT Taxonomy
- Member Portal und Affiliation Manager

ORCID Certified Service Providers

Any organization that provides a product—free or paid—that includes functionality that can authenticate ORCID iDs and update ORCID records.

- 14 Certified SP (service and open infrastructure)
- Open Journal System ([OJS-ORCID plugin](#))
- More in 2021 (e.g. [ePrints](#) and [Janeway](#))



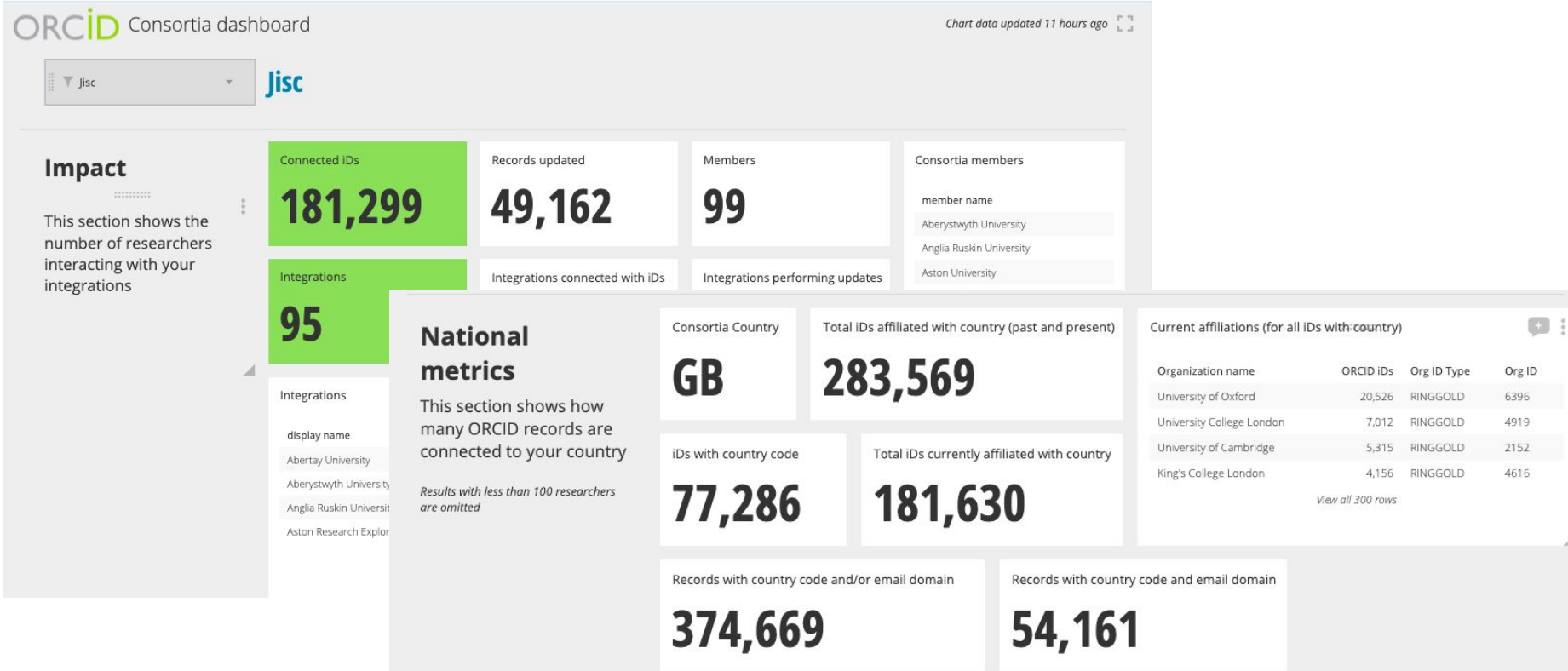
More information: <https://info.orcid.org/certified-service-providers/>



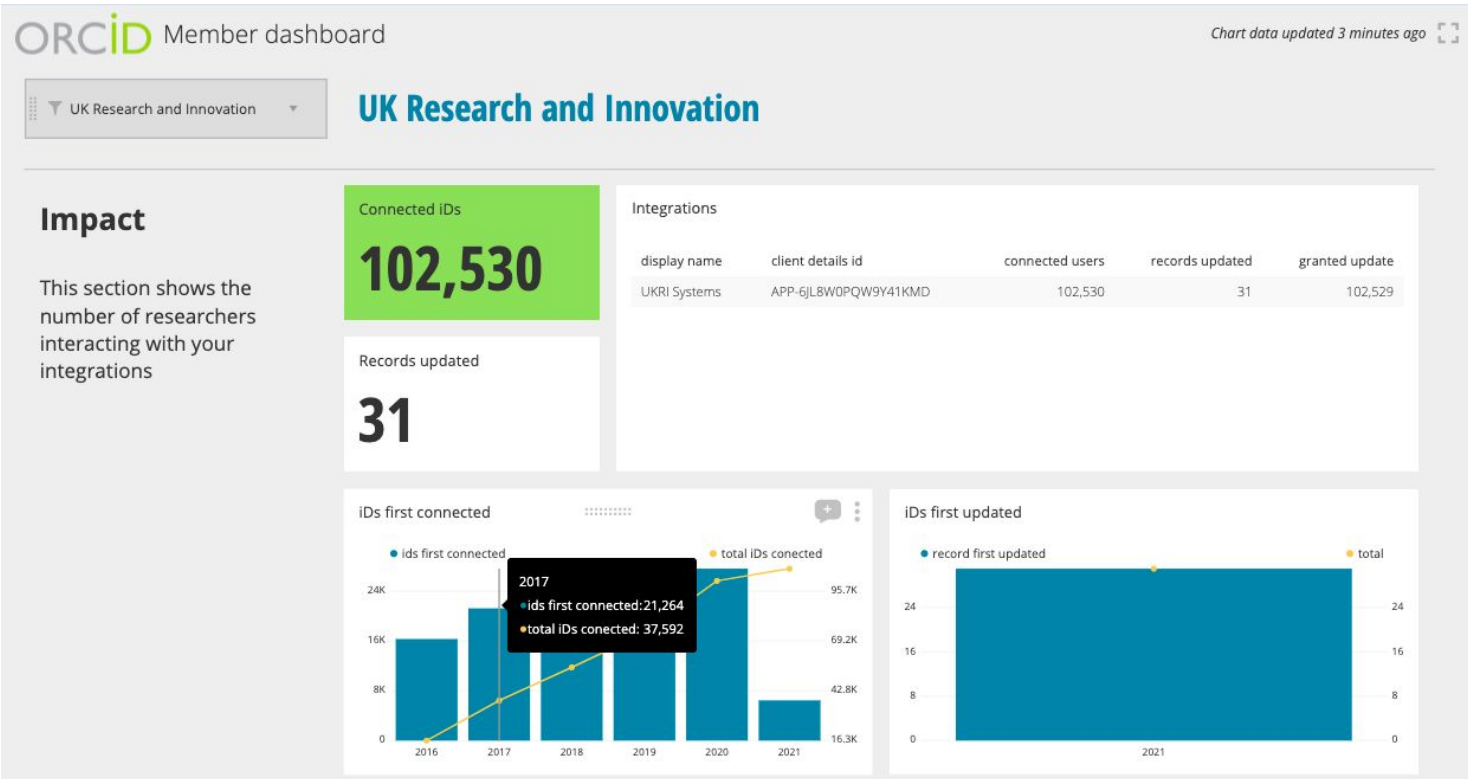
Improved Member and Consortium Reporting

- Building improved member reporting into the member portal will be our next task once the affiliation manager is on our production servers
- The portal will provide insight into how your integrations are performing, the number of iDs they've connected to, the number of records updated, user geography and more.
- As well as new features, we've incorporate the most used features of our old reporting, e.g. email domain stats.
- Reports have been well received by beta testers and consortia leads
- Feedback is always welcome

Improved Consortium Reporting



Improved Member Reporting



CRedit Taxonomy

- 14 Roles.
- Conceptualization, Data curation, Formal Analysis, Funding acquisition, Investigation, Methodology, Project administration, Resources, Software, Supervision, Validation, Visualization, Writing – original draft, Writing – review & editing.
- API 3.0+.

Country of publication

United States

Contributor

Pedro Costa (investigation, first, 0000-0000-0001-0001)

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2021-04-09

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2021-04-09

More information: <https://info.orcid.org/credit-for-research-contribution/>

Example: <https://journals.plos.org/plosone/article/authors?id=10.1371/journal.pone.0249908>



Member Portal

Warning! <https://member-portal.sandbox.orcid.org> is a test environment for the ORCID Member Portal that connects to the ORCID Registry test environment <https://sandbox.orcid.org>

ORCID Member Portal BETA | ORCID, Inc

Member Tools Administration System monitoring Account

Affiliation Manager

You are logged in as user "p.arriza@orcid.org".

Welcome Beta participants!

The ORCID Member Portal is a new suite of tools intended to help institutions make the most of their ORCID membership. To make sure that it functions properly and supports members' needs, we're running a beta program, and we're thrilled that your organization is participating.

The Member Portal is under active development and will eventually include tools that allow you to:

- Add/update data on researchers' ORCID records
- Access data and reports
- Manage your organization's ORCID membership information
- Manage your organization's ORCID API credentials

Tools currently available:

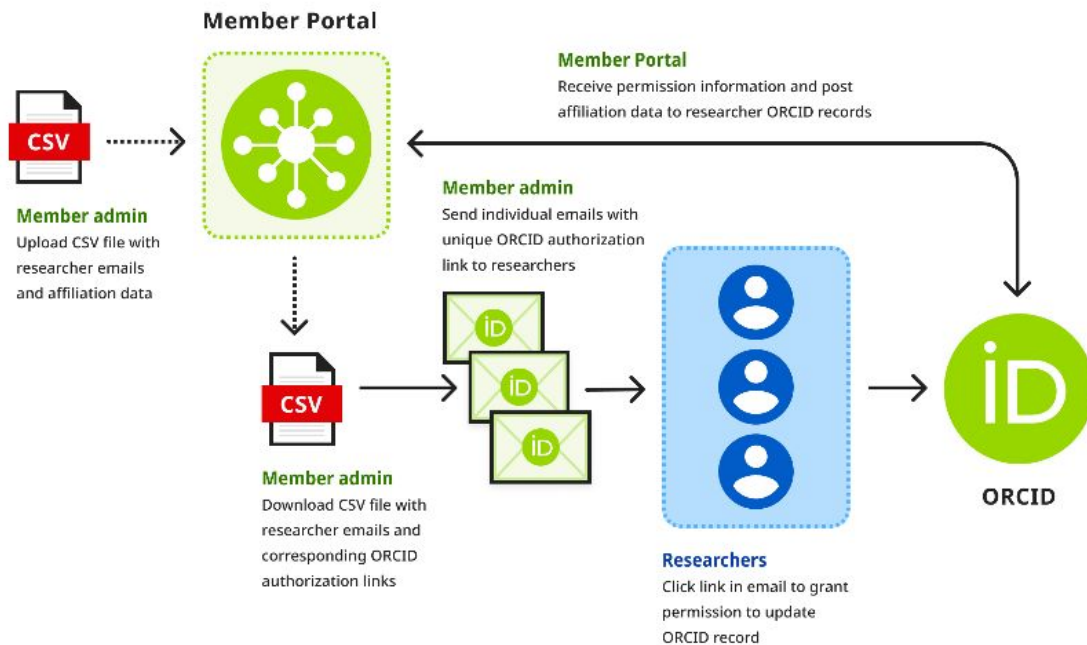
Affiliation Manager	"Affiliation Manager" simplifies the process of adding affiliation information (employment, education, etc) to ORCID records by allowing you to add and update affiliation information on behalf of your researchers using a CSV file, without any need to integrate ORCID directly into your current systems or to acquire an ORCID-enabled vendor system.
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Resources

Member portal beta program guide	Start here! This guide is a one-stop shop for information about the beta program and the Member Portal tool.
Organization admin guide	Guide for staff at your institution who will be using the Member Portal
Email guide & example text	Guide for creating the email that you will send to your researchers requesting permission to access their ORCID records
Example affiliations CSV file	Sample file showing affiliation data formatted for use with the Affiliation Manager tool



Affiliation Manager



Affiliation Manager

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Affiliations

+ Add affiliation Import affiliations from CSV Download affiliations for edit Download affiliation status report Download permission links

ID	User Email	ORCID iD	Affiliation Data	Status
60100228adb1d00088a07d3	affiliation01@mailinator.com	https://sandbox.orcid.org/0000-0002-8811-9027	EMPLOYMENT University of Wisconsin-Madison: Madison, WI, US Chemistry	In ORCID

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Add or edit affiliation

User Email

Affiliation Type

Organization Name

City State/Region Country

Organization ID Source Organization ID

Import affiliations

Please select a CSV file to upload

File path

Seleccionar archivo Ningún archivo seleccionado

Note: Please do not forget to download and send permission links to your researchers once the upload has completed.

Cancel






Upload

View Details



- Member portal: <https://info.orcid.org/documentation/features/member-portal/>
- Affiliation Manager: <https://info.orcid.org/affiliation-manager/>
- GRID: <https://www.grid.ac/pages/policies>

Affiliation Manager

▼ Employment (2)		⇅ Sort
University of Wisconsin-Madison: Madison, WI, US 2014-04 to present Associate Professor (Psychology) Employment		
Source: ORCID, Inc via ORCID Member Portal - Sandbox	★ Preferred source	
University of Wisconsin-Madison: Madison, WI, US 2015-08 to 2018-07 Assistant Professor (Biology) Employment		
Source: ORCID, Inc via ORCID Member Portal - Sandbox	★ Preferred source	
▼ Education and qualifications (1)		⇅ Sort
University of Granada: Granada, ES, ES 2007-10 to 2023-07 (Physics) Education		
Source: ORCID, Inc via ORCID Member Portal - Sandbox	★ Preferred source	
▼ Invited positions and distinctions (2)		⇅ Sort
Freie Universität Berlin: Berlin, DE, DE 2014-04 to present Lab Manager (Water Chemistry) Invited position		
Source: ORCID, Inc via ORCID Member Portal - Sandbox	★ Preferred source	
TU Wien: Vienna, AT 2020-03-01 to 2021-01-31 Invited position		
Source: ORCID, Inc via ORCID Member Portal - Sandbox	★ Preferred source	

Affiliation Manager & Data Protection

“We have completed a Data Protection Impact Assessment (DPIA) for the Member Portal. The DPIA helped us identify and minimise the data protection risks of the Member Portal, and is required under GDPR for initiatives that might be considered large changes or represent higher risk. In this case, because member data flows differently between members and ORCID in the Affiliation Manager than with the current member API, we felt that a DPIA would be appropriate.

The principal conclusion from the DPIA is that ORCID acts as a [Data Processor](#) with regard to the personal information uploaded by members using the Affiliation Manager. This is different than with the current member API, where ORCID acts as a [Data Controller](#). As a result, we are making changes to our privacy policy to specifically explain this to ORCID users.

Also, as we have been working to understand the impact of the ruling of the European Court of Justice in the *Schrems II* case, and the invalidation of the EU–U.S. Privacy Shield Program on ORCID, we have determined the need to offer Members in the EU/EEA/UK the opportunity to add Standard Contractual Clauses (SCCs) to their ORCID membership agreement to safeguard personal data transfers to the U.S. We are currently working on implementing the process for these to be signed when requested by a member.

We are working hard on the preparation of the SCCs and the updated privacy policy as a precursor to making the Affiliation Manager available to members in the EU/EEA/UK. We expect that both will be complete within the next few weeks.”





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Thank you for listening