



ORCID: WHAT AND HOW?

ORCID-DE 7 SEPTEMBER 2017

WILL SIMPSON <https://orcid.org/0000-0003-4654-1403>

Imagine a world where:

You could search the internet and find all of a researcher's work with a single query – in any browser

A researcher could autopopulate standard publication and grant forms – any platform, any country

You could in near real time see what your researchers or grantees are publishing – and also know their current affiliation and other funding



WHAT IS ORCID?

- An identifier for researchers
- A registry
- A set of standard procedures for connecting researchers to their affiliations and activities
- A committed community building connectors
- An international-scale open research effort



ORCID's vision is a world where all who participate in research, scholarship, and innovation are uniquely identified and connected to their contributions and affiliations across time, disciplines, and borders.



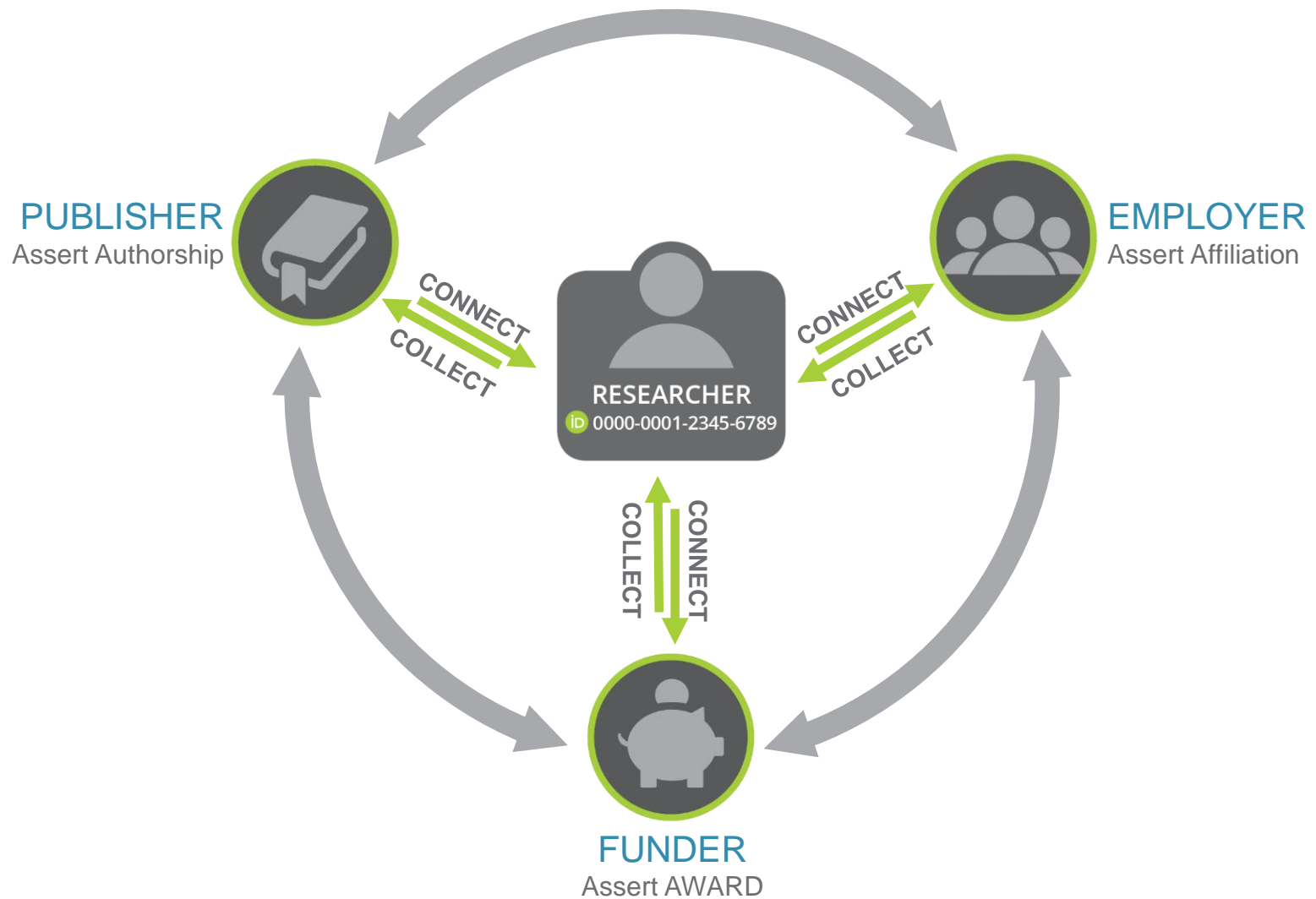
RESEARCH WORKFLOWS

- Completing a thesis or dissertation
- Receiving an award, certificate, or training qualification
- Sharing research via articles, datasets, and activities
- Presenting at a conference
- Applying for funding or using research facilities
- Reviewing and expert panels



- Joining a new community or organization

INTEROPERABILITY—ENTER ONCE REUSE OFTEN



THE ORCID COMMUNITY

- Over 3.1415m researchers, 1m records with at least one connection, 8m unique DOIs
- 644 members from 40 countries, consortia in the UK, Denmark, Finland, Sweden, Netherlands, Belgium, Germany, Italy, Taiwan, Australia, New Zealand, Canada and the US
- Over 550 integrations across sectors of the research community

Sustain

SUSTAINABILITY: Financial Break-Even

☰ 1 0/11



OUTREACH: Improve support for Ambassadors and partnerships

☰ 2 1/11



ENGAGEMENT: Expand Collect & Connect program

☰ 2 0/11

REGISTRY: Improve Quality of Registry and Services

☰ 1 1/13

GOVERNANCE: Ensure prudent, community-based decision-making

☰ 1 7/28

Add a card...

Lead

NEW FEATURES: User/Member Interface improvements

☰ 1 0/19

BE AN EXEMPLAR: Eat our own dog food!!

☰ 1 0/13



CELEBRATE: ORCID Milestones!

☰ 2 1/7

THOUGHT LEADERSHIP: Build momentum across policy bodies and sectoral influencers

☰ 1 0/11



EXPLORE: Identify potential new user communities

☰ 2 0/10

Add a card...

Mature



TRAINING: Develop and roll out ORCID curriculum and training resources

☰ 2 0/6

CONSORTIA: Improve onboarding, sharing of effective practices

☰ 1 0/8



RESILIENCY: Improve resilience of ORCID services

☰ 2 2/17

ORCID TRUST: Operationalize program / Lead in policies and practices

☰ 3 4/20

Add a card...




<https://trello.com/b/ECJQ9Agx/2017-orcid-roadmap-public>

COLLECT AND CONNECT!

With hundreds of our members globally building ORCID identifiers into their systems, as well as some funders and publishers now requiring ORCID iDs, researchers are increasingly likely to encounter ORCID in their day-to-day life. We developed the Collect and Connect program to streamline the integration process and foster a shared user experience. This ensures researchers and our members understand what ORCID is and why and how to engage.

<http://orcid.org/content/collect-connect>



A person is shown from the waist up, holding a very tall, thick stack of papers. The papers are of various colors, including green, blue, red, and yellow. The person is wearing a light-colored jacket and a dark belt. The background is a plain, light color.

Spend more time making
contributions and less time
managing them

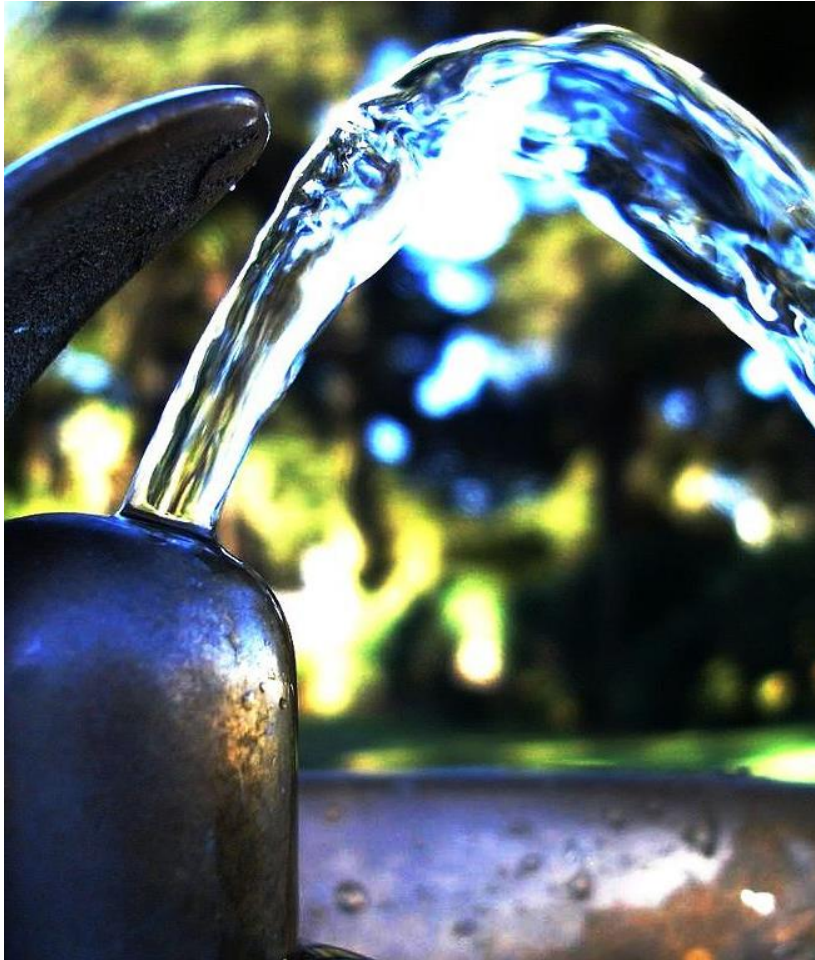
orcid.org/register



Enter Once | Reuse Often



ORCID IS PART OF THE PLUMBING







COLLECT & CONNECT GOALS

- **Clarify** goals and expectations across sectors
- **Standardize and improve** the user experience
- **Build** understanding and trust in connections between ORCID and other identifiers
- **Increase** efficiency and quality of integrations
- **Achieve** the ORCID vision through a community approach

COLLECT & CONNECT



COLLECT!



- Collect and store **authenticated** iDs
- Provide an **ORCID-branded** button for collecting iDs
- Explain **benefits** of having an iD for your researchers
- Explain **benefits** of including ORCID iDs at your site

DISPLAY!



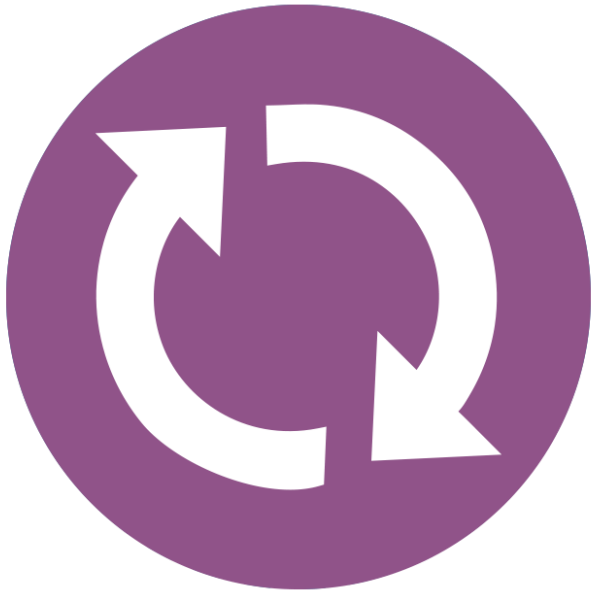
- Store and publicly display iDs
- Display the ORCID iD with the iD icon, **following ORCID guidelines**
- **Use the member logo** when describing your organization's connection with ORCID
- **Explain** why you collect iDs

CONNECT!



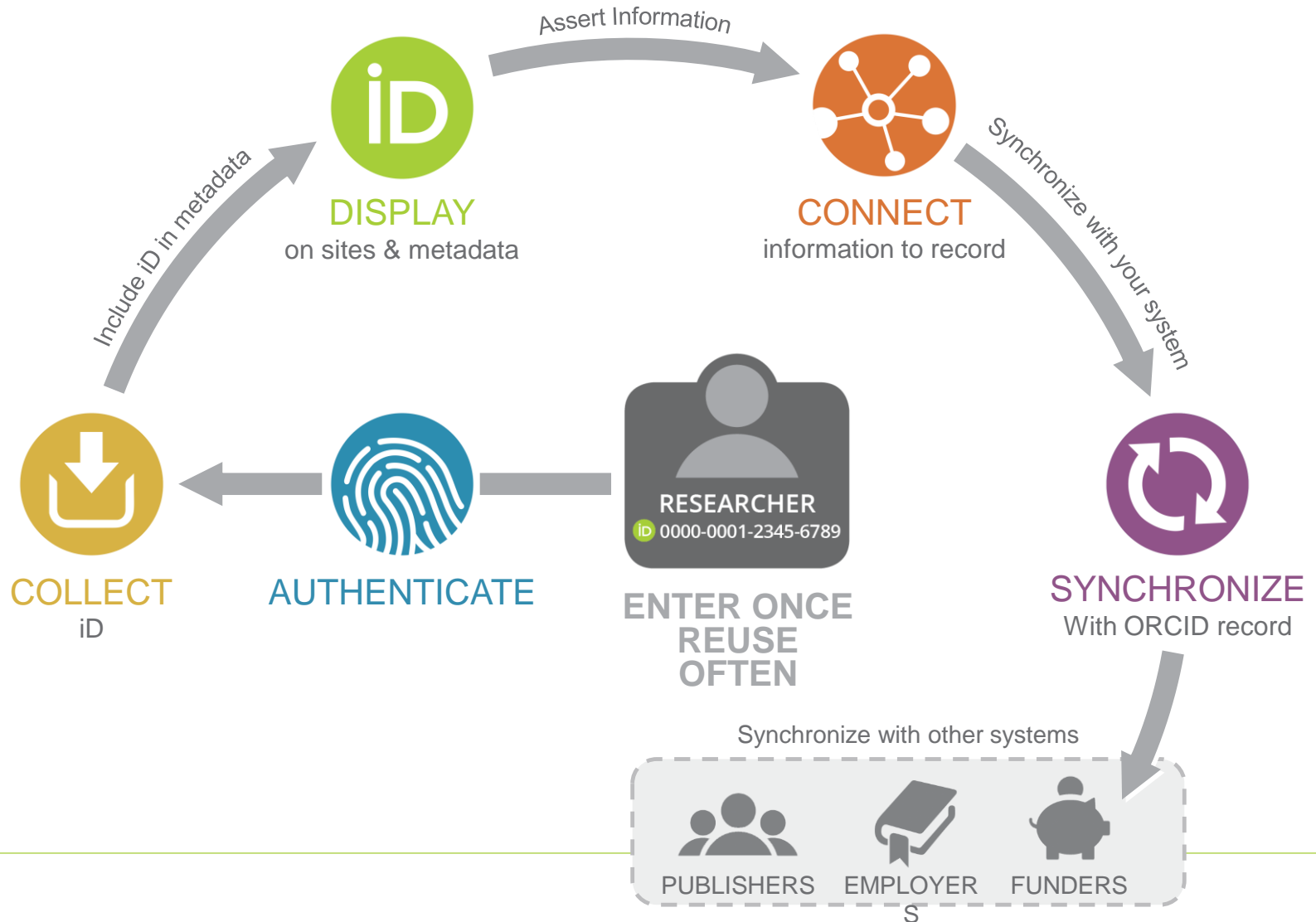
- Request permissions to **write to/update** the user's ORCID record to **assert** affiliation, works, etc OR
- Ingest information from ORCID records to **auto-populate** forms
- Explain the **benefits** of your system connections with ORCID

SYNCHRONIZE!



- Create **bidirectional information flow** (synchronization) between ORCID and your system AND/OR
- **Automatically update** ORCID records AND/OR
- Create a **search & link** wizard
- In all cases, explain **benefits** to individual

COLLECT & CONNECT WORKFLOW





OUR PROGRESS TO DATE

- Full documentation on members.orcid.org
 - Updated for API 2.0
- Mapping current integrations
 - 20% completed to date
- First Collect & Connect badges awarded



OUR NEXT STEPS

- Collect, Connect, and Communicate!
 - Communications toolkit
 - Use cases and best practice examples
 - Templates
- Collect & Connect one year celebration
- Combined C&C integration/member list on orcid.org
- Recognition program for members



WORKING WITH YOU

- Map your integrations against Collect & Connect elements
- Discuss your future plans
- Share your experiences with ORCID community
- Award you your badges!

Growing adoption of ORCID on Overleaf – over 5,000 linked ORCID accounts and four ORCID badges!



71 shares

By *Michael Mazour*
February 23, 2017

At the start of November 2016 we launched our [integration with ORCID](#), to enable users to link their Overleaf account with their ORCID ID to help securely establish their identity and provide a quick way to login to Overleaf using their ORCID credentials.

We're delighted to announce that as of today, 5,295 Overleaf users have linked their ORCID accounts with their Overleaf account – equivalent to almost 50 per day since the launch! It's great to see such a rapid adoption of ORCID by our users, and reflects the growing adoption of ORCID as a standard, persistent identifier for researchers around the world.

We're also excited to have received our first four ORCID badges (who doesn't like badges?!) for officially conforming to the ORCID standards for Authenticating, Collecting, Displaying and Connecting the ORCID IDs on Overleaf. Check out our badge gallery below :-)



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Start writing now!

CREATE A NEW PAPER

Overleaf is free
No sign-up required



MORE INFORMATION

Blog post: <https://orcid.org/content/collect-connect>

Updated documentation: <https://members.orcid.org/>

Questions: support@orcid.org

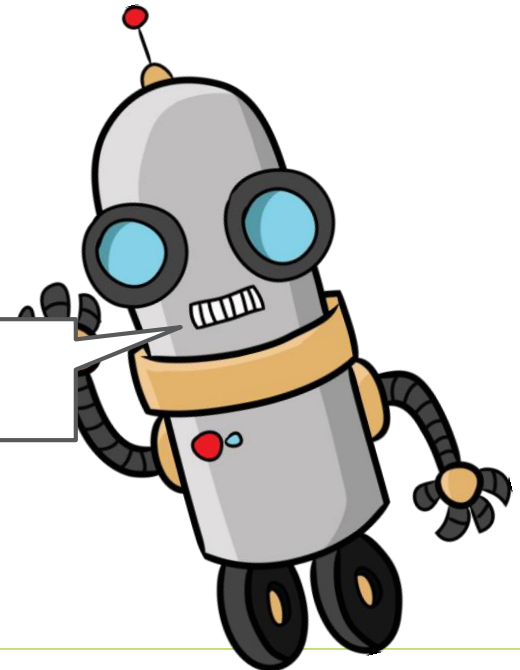


What is ORCID, from a tech perspective?

A big (organized) pile of **DATA**
...plus **TOOLS** for using the data:

APIs (+ Website)







Application Programming Interfaces



Huh?

API = A way for other systems (like yours!) to interact with ORCID

- Get data out
- Put data in
- ...and a few other cool things!

	Public API	Member API
COLLECT authenticated iDs		
DISPLAY iDs you've collected in your system		
CONNECT get data from ORCID + add affiliations/contributions	X	
SYNCHRONIZE add data to/get data from ORCID on an ongoing basis	X	





COLLECT authenticated iDs

It all starts here!

A snippet of a web interface showing a button with the ORCID logo and the text "Create or Connect your ORCID iD". To the left of the button is a greyed-out input field containing "XXX".

User clicks a link/button on your site, then signs into ORCID (or creates new account)

[How about a live demo?!](#)

A screenshot of a web browser window showing the ORCID authentication page. The browser title is "ORCID" and the URL is "https://sandbox.orcid.org/oauth/signin?redirect_uri=https%3A%2F%2F...". The page content includes the ORCID logo, the text "Publisher Pals Manuscript System" and "has asked for the following access to your ORCID Record". Below this is a list of permissions, with the first one checked: "Allow this permission until I revoke it." At the bottom, there are buttons for "Sign into ORCID or Register now", "Personal Account", and "Institutional Account", followed by a "Sign in with your ORCID account" section with input fields for "Email or iD" and "ORCID Password". A large pink arrow points from the button in the left snippet to the "Sign into ORCID or Register now" button in the screenshot.





COLLECT authenticated iDs



We send the user back to a page on your site, with an authorization code added to the URL

Your system exchanges that code for an access token + user's ORCID iD

```
{ "access_token": "0a3ac65f-f8a7-4257-b605-  
a1f0ab37d464", "token_type": "bearer", "refresh_token": "16d75d  
2d-bb75-4087-8a01  
685e5f03faf8", "expires_in": 631138518, "scope": "/orcid-  
profile/read-limited", "orcid": "0000-0003-4153-0078" }
```



COLLECT authenticated iDs

Researcher Database

Name

ORCID iD

ORCID Access Token

Faculty ID

Store iDs and Access Tokens in your system - you'll need these to **DISPLAY**, **CONNECT** and **SYNCHRONIZE** (ie: get data from or add data to ORCID)

DISPLAY

Now that you have iDs stored in your system, display is easy:

 <https://orcid.org/0000-0001-6622-4910>

No API request or Access Token needed - just follow our [display guidelines](#)

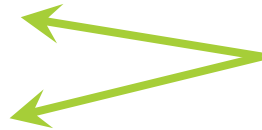


CONNECT

Remember those Access Token you stored?

Now you can use them to make API requests:

- Get data
- Add data



Per permissions you requested back at the COLLECT step

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<orcid-message xmlns="http://www.orcid.org/ns/orcid" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.orcid.org/ns/orcid https://raw.githubusercontent.com/ORCID/ORCID-Source/master/orcid-
model/src/main/resources/orcid-message-1.2.xsd">
<message-version>1.2</message-version>
<orcid-profile>
<orcid-activities>
<affiliations>
<affiliation>
<employment>
```

▼ Employment (1)

↑ Sort

University of Colorado Boulder: Boulder, CO, United States

Source: Faculty Affairs at the University of Colorado Boulder

Created: 2014-07-15





SYNCHRONIZE

...and keep on adding/getting data whenever it changes in your system, or in **ORCID**

- Access Tokens are long-lived (20yrs)
- **Webhooks** can notify your system when ORCID records you're watching change

Great! How do I get started?

members.orcid.org

Not sure where to start?

support@orcid.org



Already using the APIs?

HOORAY!

...we've got some great new stuff for you!



V2 API: SIMPLER!

- Only 4 Scopes! (instead of 13...)

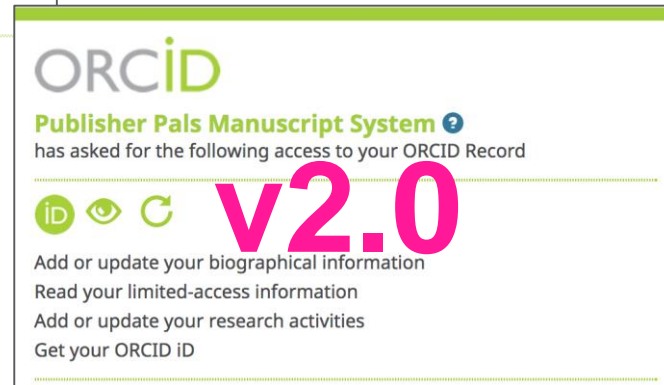


ORCID
ORCID Test Client 2 ?
has asked for the following access to your ORCID Record

id eye up refresh

Read items in your ORCID record
Get your ORCID iD
Read limited info from your funding list
Add funding items
Add education or employment
Update your works
Update your biographical information
Add a person identifier
Add works
Read limited info from your affiliations list
Read your ORCID record
Update your affiliations
Update your funding items

v1.2



ORCID
Publisher Pals Manuscript System ?
has asked for the following access to your ORCID Record

id eye refresh

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

v2.0

V2 API: SIMPLER!

- Read record sections/items, instead of entire record
- Update/delete individual items

Personal Details

```
{
  "last-modified-date": {"value": 1462157547720}, "name":
  {"created-date": {"value": 1460757617078}, "last-modified-
  date": {"value": 1460757617078}, "given-names": {"value":
  "Josiah"}, "family-name": {"value": "Carberry"}, "credit-name":
  null, "source": null, "visibility": "PUBLIC", "path":
  null}, "other-names": {"last-modified-date": {"value":
  1462157547720}, "other-name": [{"created-date": {"value":
  1462157351411}, "last-modified-date": {"value":
  1462157547720}, "source": {"source-orcid": {"uri":
  "http://orcid.org/0000-0002-1825-0097", "path": "0000-0002-
  1825-0097", "host": "orcid.org"}, "source-client-id":
  null, "source-name": {"value": "Josiah Carberry"}}, "content":
  "Josiah Stinkney Carberry", "visibility": "PUBLIC", "path":
  "/0000-0002-1825-0097/other-names/732317", "put-code":
  732317, "display-index": 3}, {"created-date": {"value":
  1446663146889}, "last-modified-date": {"value":
  1462157547720}, "source": {"source-orcid": {"uri":
  "http://orcid.org/0000-0002-1825-0097", "path": "0000-0002-
  1825-0097", "host": "orcid.org"}, "source-client-id":
  null, "source-name": {"value": "Josiah Carberry"}}, "content":
  "J. Carberry", "visibility": "PUBLIC", "path": "/0000-0002-1825-
  0097/other-names/565981", "put-code": 565981, "display-index":
  2}, {"created-date": {"value": 1462157351418}, "last-modified-
  date": {"value": 1462157547720}, "source": {"source-orcid":
  {"uri": "http://orcid.org/0000-0002-1825-0097", "path": "0000-
  0002-1825-0097", "host": "orcid.org"}, "source-client-id":
  null, "source-name": {"value": "Josiah Carberry"}}, "content":
  "J. S. Carberry", "visibility": "PUBLIC", "path": said to still
  teach at Brown University, and to be known for his work in
```

Keywords

```
{
  "last-modified-
  date": {"value": 1462157635636}, "keyword": [{"c
  reated-date": {"value": 1462157617244}, "last-
  modified-
  date": {"value": 1462157635636}, "source": {"sou
  rce-orcid": {"uri": "http://orcid.org/0000-
  0002-1825-0097", "path": "0000-0002-1825-
  0097", "host": "orcid.org"}, "source-client-
  id": null, "source-
  name": {"value": "JosiahCarberry"}}, "content":
  "psychoceramics", "visibility": "PUBLIC", "path
  ": "/0000-0002-1825-
  0097/keywords/434187", "put-
  code": 434187, "display-index": 3}, {"created-
  date": {"value": 1462157414545}, "last-
```

Websites



```
{
  "last-modified-
  date": {"value": 1462157645967}, "researcher-
  url": [{"created-
  date": {"value": 1446663146890}, "last-
  modified-
  date": {"value": 1462157645967}, "source": {"sou
  rce-orcid": {"uri": "http://orcid.org/0000-
  0002-1825-0097", "path": "0000-0002-1825-
  0097", "host": "orcid.org"}, "source-client-
  id": null, "source-
  name": {"value": "JosiahCarberry"}}, "url-
  name": "BrownUniversityPage", "url": {"value": "
  http://library.brown.edu/about/hay/carberry.
  php"}, "visibility": "PUBLIC", "path": "/0000-
  0002-1825-0097/researcher-urls/568395", "put-
  code": 568395, "display-index": 2}, {"created-
  date": {"value": 1446663146889}, "last-
```




INSTITUTIONAL SIGN-IN




- **Works already for many institutions!**
SURFconext & eduGAIN members, including US InCommon federation
- **If yours doesn't work, some configuration may be needed**
Requires that you send a persistent NameID, eduPersonUniqueID (ePUID) *OR* eduPersonTargetedID (ePTID)

Sign in using your


 Personal Account  Institutional Account

Sign in with an institutional account 

Use a suggested selection:

		
University of Michigan	University of Wisconsin-Madison	University of Illinois at Urbana-Champaign

Or enter your organization's name



[Allow me to pick from a list](#)

Don't have an ORCID iD yet? [Register now](#)

INSTITUTIONAL SIGN-IN CROSS-LINK

Automatically request iDs and record access permission from users who sign in via your institution

The image illustrates the institutional sign-in process on the ORCID platform. It is divided into two main sections:

Top Section (ORCID User Interface):

- Header:** Includes the ORCID logo, navigation tabs for 'FOR RESEARCHERS', 'FOR ORGANIZATIONS', 'ABOUT', 'HELP', and 'SIGN OUT', and a search bar.
- User Profile:** Displays the name 'Lizbert Jane Staff Testing Account'.
- Notification:** A yellow banner titled 'Connecting your institutional account' with the text: 'You can now sign into ORCID with your United ID account. Please complete the process by connecting State College University with your ORCID record.' It includes a 'Connect' button and a 'Remind me later' link.

Bottom Section (Confirmation Window):

- Title:** 'ORCID @ State College University'.
- Status:** A green banner reads 'Connection complete!'.
- Message:** 'Thanks Lizbert Jane!'.
- Details:** 'We have stored your ORCID <http://orcid.org/0000-0002-1825-0097> in State University records. We've posted information about your role at State University to your ORCID record. Please review your record to confirm that the information is correct. If you notice any errors, please contact orcid@stateuniversity.edu.
- Action:** A button labeled 'View your ORCID record'.



OK, enough tech.

How does this work in the real world?

Let's look at some **EXAMPLES**





COLLECT (+ DISPLAY)

Nature collects authenticated iDs and displays them in published articles

nature.com | Publications A-Z index | Browse by subject

authors & referees

Personal profile | My Account

ORCID

https://orcid.org/oauth/authorize?response_type=code&redirect_uri=http%3A%2F%2Fmts-spd.nature.com%2Fapps...

ORCID

Robert Peters
http://orcid.org/0000-0002-0036-9460
(Not You?)

Nature Publishing Group has asked for the following access to your ORCID Record

Read your ORCID record

This application will not be able to see private info in your ORCID Record. Pr

nature immunology

nature.com | journal home | advance online publication | article | abstract

ARTICLE PREVIEW

view full access options >

NATURE IMMUNOLOGY | ARTICLE

Chen Dong orcid.org/0000-0002-0084-9130

Department of Immunology and Center for Inflammation and Cancer, MD Anderson Cancer Center, Houston, Texas, USA.
Tsinghua University School of Medicine, Beijing, China.

Contact Chen Dong

Search for this author in:
NPG journals . PubMed . Google Scholar

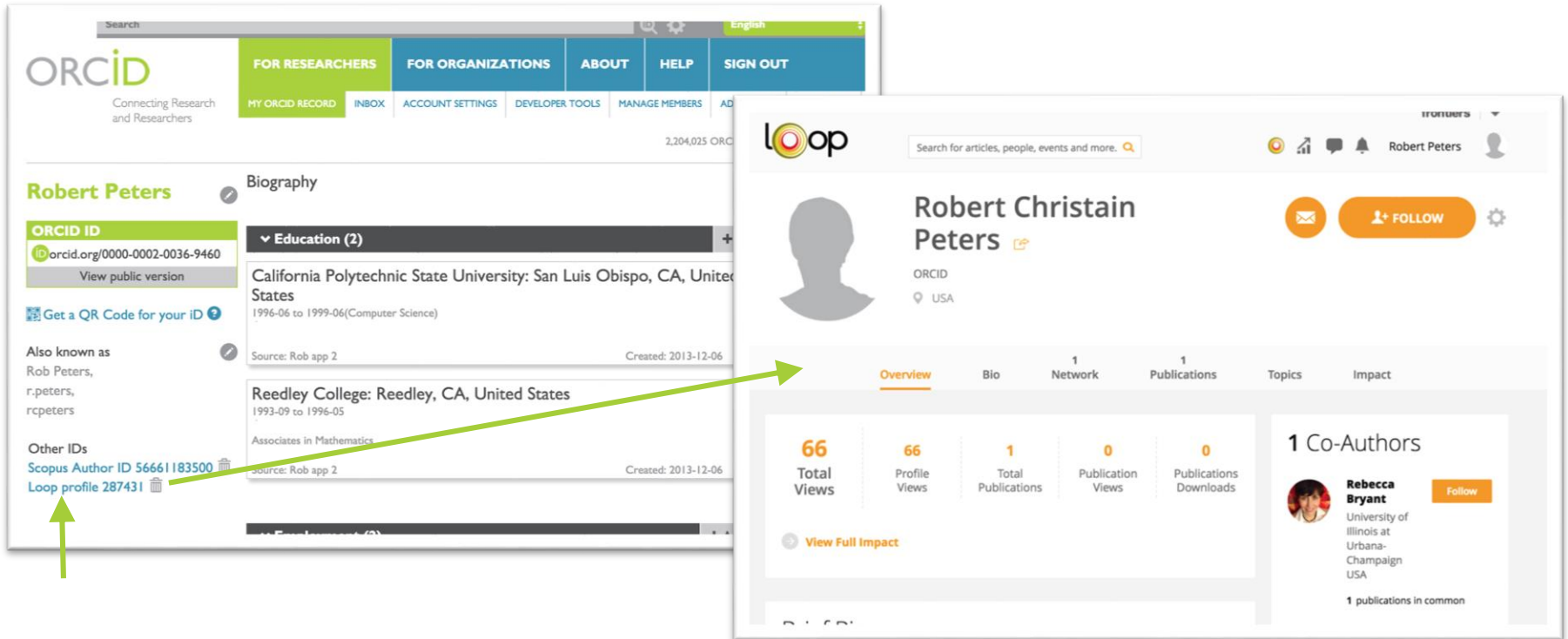
Kuexian O Y
Romica Kerk
Watowich & Chen Dong

Affiliations | Contributions | Corresponding authors

Lecturer / Senior Lec
Molecular Biology / C
University of Southam



CONNECT



The image shows two overlapping screenshots of user profiles. The background screenshot is the ORCID profile for Robert Peters, displaying his ORCID ID (0000-0002-0036-9460), biography, and education history at California Polytechnic State University and Reedley College. The foreground screenshot is the Loop profile for Robert Christain Peters, showing a summary of his profile with statistics: 66 Total Views, 66 Profile Views, 1 Total Publication, 0 Publication Views, and 0 Publications Downloads. It also lists 1 Co-Author, Rebecca Bryant. A green arrow points from the 'Loop profile 287431' link in the ORCID profile to the Loop profile in the foreground.

ORCID Profile:

- ORCID ID: orcid.org/0000-0002-0036-9460
- Also known as: Rob Peters, r.peters, rcpeters
- Other IDs: Scopus Author ID 56661183500, Loop profile 287431
- Education (2): California Polytechnic State University: San Luis Obispo, CA, United States (1996-06 to 1999-06, Computer Science); Reedley College: Reedley, CA, United States (1993-09 to 1996-05)

Loop Profile:

- Robert Christain Peters
- ORCID: USA
- Statistics: 66 Total Views, 66 Profile Views, 1 Total Publications, 0 Publication Views, 0 Publications Downloads
- 1 Co-Authors: Rebecca Bryant (University of Illinois at Urbana-Champaign, USA)

Loop gets permission to update a user's ORCID record, then adds a person identifier, connecting their ORCID iD to their Loop profile





ImpactStory

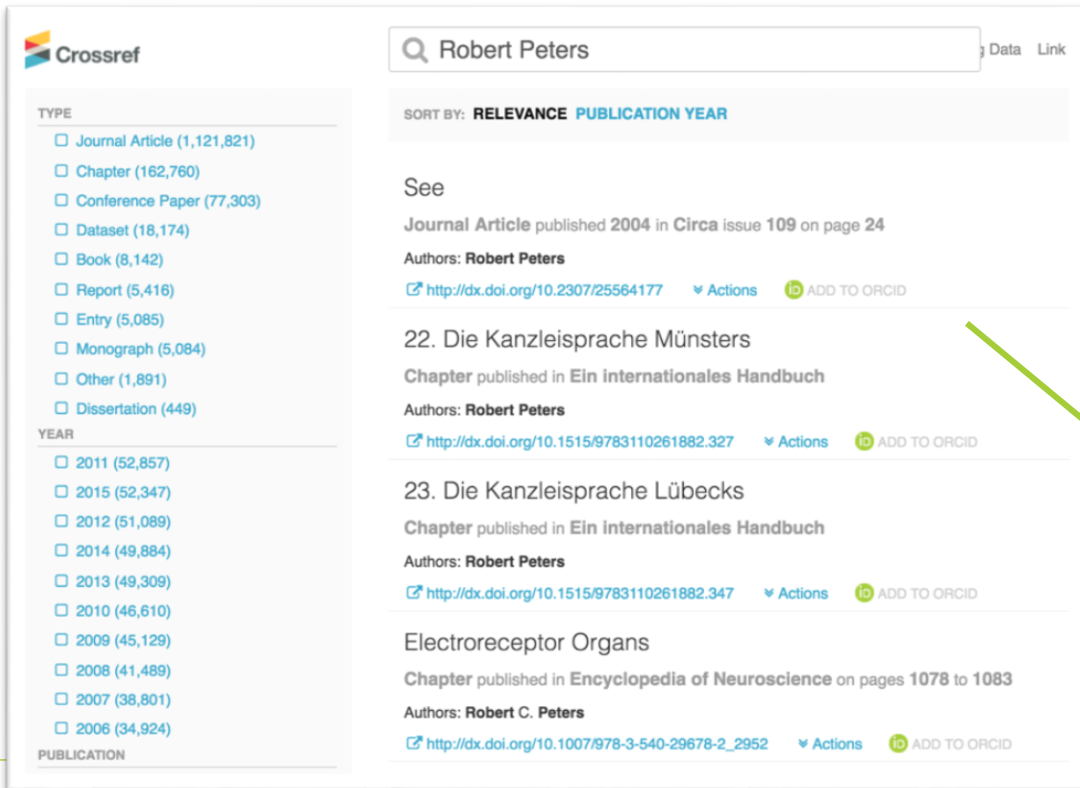
uses ORCID as a data source for providing insights into researcher impact.

The screenshot shows the ImpactStory profile for Robert Peters. The header is orange with the ImpactStory logo and a 'Log in' link. The profile name 'Robert Peters' is followed by ORCID and Twitter icons, and his title 'ORCID Technical Operations Director'. Below the name are statistics: 1 article, 3 followers, and 2 publications. The profile is divided into four tabs: OVERVIEW (selected), ACHIEVEMENTS, MENTIONS, and PUBLICATIONS. The ACHIEVEMENTS section includes 'Open Sesame 97' (60% gold open access) and 'Global Reach 57' (5 countries). The MENTIONS section shows 17 online mentions across 1 channel. The PUBLICATIONS section lists 'ORCID Public Data File 2015' (13 mentions) and 'ORCID Annual Public Data File, 2013' (4 mentions).



SYNCHRONIZE

Crossref gets permission to update a user's ORCID record, then automatically adds new works to the record when DOIs with the user's iD in their metadata are minted.



Crossref search results for **Robert Peters**. The search bar shows "Robert Peters" and "Data Link" options. The results are sorted by **RELEVANCE** and **PUBLICATION YEAR**.

TYPE

- Journal Article (1,121,821)
- Chapter (162,760)
- Conference Paper (77,303)
- Dataset (18,174)
- Book (8,142)
- Report (5,416)
- Entry (5,085)
- Monograph (5,084)
- Other (1,891)
- Dissertation (449)

YEAR

- 2011 (52,857)
- 2015 (52,347)
- 2012 (51,089)
- 2014 (49,884)
- 2013 (49,309)
- 2010 (46,610)
- 2009 (45,129)
- 2008 (41,489)
- 2007 (38,801)
- 2006 (34,924)

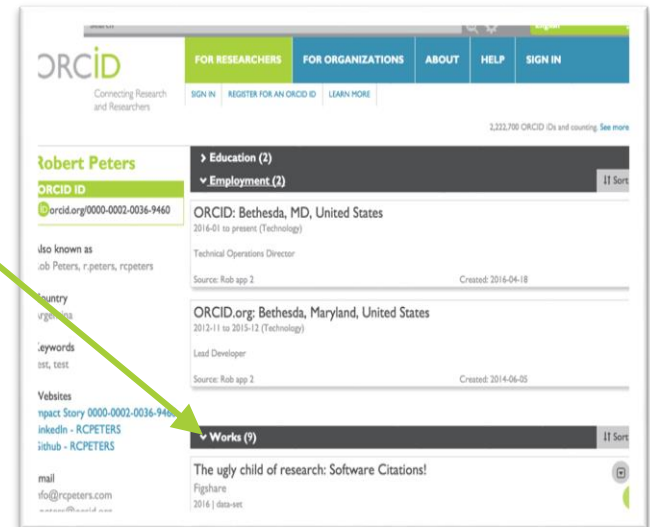
PUBLICATION

See
Journal Article published 2004 in Circa issue 109 on page 24
Authors: **Robert Peters**
<http://dx.doi.org/10.2307/25564177> Actions ADD TO ORCID

22. Die Kanzleisprache Münsters
Chapter published in Ein internationales Handbuch
Authors: **Robert Peters**
<http://dx.doi.org/10.1515/9783110261882.327> Actions ADD TO ORCID

23. Die Kanzleisprache Lübecks
Chapter published in Ein internationales Handbuch
Authors: **Robert Peters**
<http://dx.doi.org/10.1515/9783110261882.347> Actions ADD TO ORCID

Electroreceptor Organs
Chapter published in Encyclopedia of Neuroscience on pages 1078 to 1083
Authors: **Robert C. Peters**
http://dx.doi.org/10.1007/978-3-540-29678-2_2952 Actions ADD TO ORCID



ORCID profile for **Robert Peters**. The profile shows the ORCID ID orcid.org/0000-0002-0036-9460 and lists works, education, and employment.

Works (9)

The ugly child of research: Software Citations!
Figureware
2016 | data-set



THANKS FROM THE ORCID TECH TEAM!

Questions?

Will Simpson

Tech Lead

 <https://orcid.org/0000-0003-4654-1403>

w.simpson@orcid.org

<http://members.orcid.org>

<https://groups.google.com/forum/#!forum/orcid-api-users>

