



How does my organization integrate with ORCID?

2 March 2023

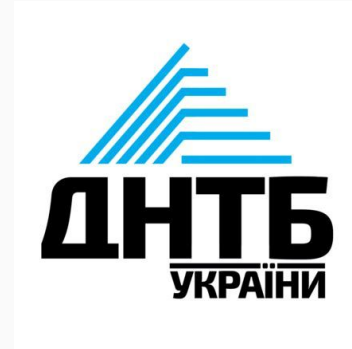
I'm here to help you



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Together with your consortium lead
SSTL of Ukraine



Why should you integrate?

To make researchers' life easier and to maximize your membership benefits!

Only ORCID members can **add** items to ORCID records and/or **synchronize** with the ORCID Registry.

What's in a name?

Most names are not unique

Many people have the same or similar name, and names may change through marriage or other circumstances.

Individuals and organizations can use different alphabets, abbreviations, or naming conventions.

People use different versions of their names during their career.

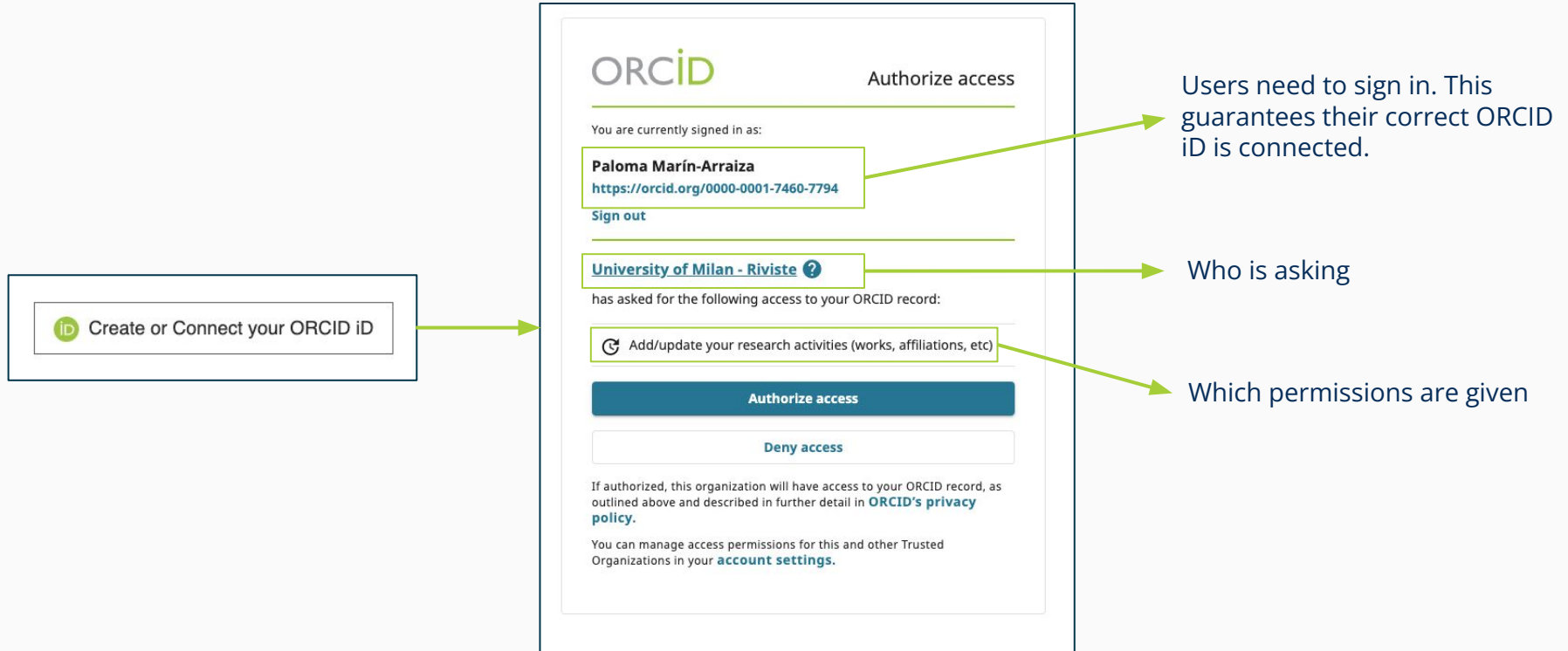
The infographic includes several icons: a graduation cap, a lightbulb, a magnifying glass over a name, a globe, and a book. A woman is shown with an 'id' badge on her lapel. The text explains that many names are not unique and can change, and that people use different versions of their names during their career. It also notes that individuals and organizations can use different alphabets, abbreviations, or naming conventions.

**Let's clarify exactly what an
ORCID Integration is.**

Integrations are key to deriving value from ORCID

- ✓ They connect an institutional system with the ORCID registry using the ORCID API.
- ✓ They require users' authentication.
- ✓ They enable data synchronization with ORCID (using the member API).
- ✗ They are *not* a data look-up in the ORCID registry.

Authentication process in an integration



**There are several ways to
integrate with ORCID!**

Option 1: Certified Vendor Systems can be the quickest way to integrate your systems with ORCID.

- ORCID Certified Service Providers meets ORCID integration best practices
- It is about configuring your system to work with ORCID.
- Please visit our [ORCID Certified Service Providers](#) for more information

The service provider is your first point of contact!

Option 2 : Vendor Systems that support ORCID can be simple too!

- CRIS systems
- Repository systems
- Funding systems
- Publishing systems

The vendor is your first point of contact!

Option 1 and 2: Vendor integrations - Workflow

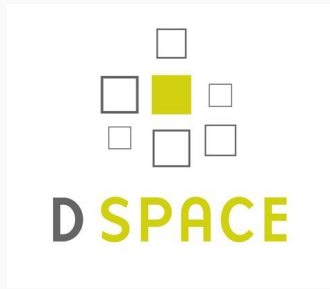
ORCID pre-approves the integration

- The ORCID team works with the system provider to have an integration that fulfils ORCID best practices.
- Members are welcome to test in the [Sandbox](#), but it is not mandatory

Production

- [Request Production credentials](#)
- Launch integration officially

DSpace 7.3 (and forward), OJS 3, ePrints, among others, are in this category



[DSpace documentation](#)



[OJS documentation](#)



[DSpace CRIS documentation](#)



[ePrints documentation](#)

Option 3: Developing a custom integration can take more time and effort, but we're here to help.

1. Check in with the ORCID team regarding integration plans
2. Develop & test your integration using our [Sandbox Testing Server](#)
3. Learn about our [integration best practices](#) & ensure your integration meets our [minimum requirements](#) for launch.
4. Schedule a demonstration with our team
5. Once approved, [apply for Member API Credentials](#)
6. Launch your integration & communicate with the community

We're happy to help you promote your integration when it goes live!

Option 3: Custom integrations - Workflow

Testing in the Sandbox

- [Request Sandbox credentials](#)
- Test in the Sandbox using the documentation
- Questions during the process to be sent to the consortium lead or escalated to ORCID if complex (membersupport@orcid.org)

Review

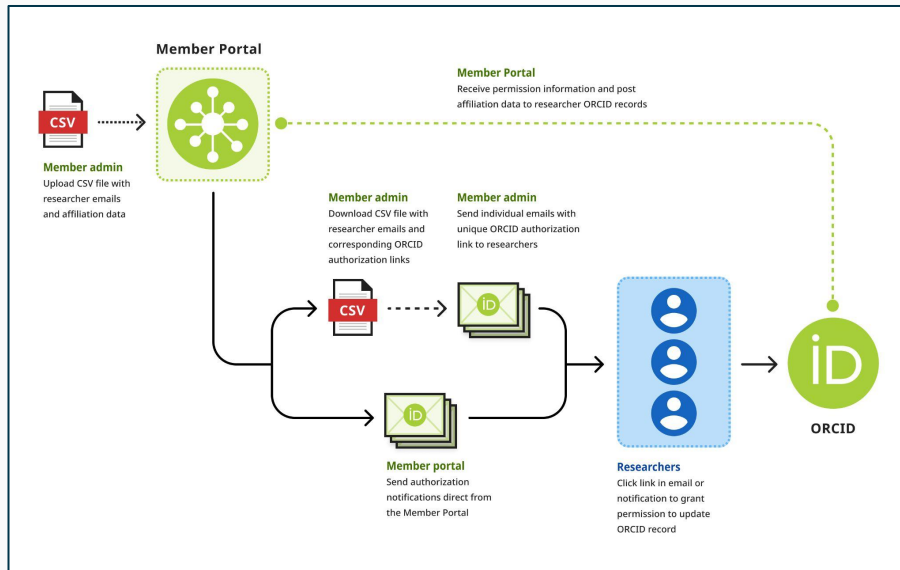
- Based on the checklist
- Documented with screenshots or screencast
- A Sandbox ORCID iD containing data added through the integration is desirable

Production

- [Request Production credentials](#)
- Launch integration officially

Option 4: Consortium members have access to the Affiliation Manager.

Available for affiliation data (employment, education, qualifications, invited positions, services & membership).



Don't miss the "I'm a Member, Now What?" session on the Affiliation Manager coming in July 2023!



Further information:

<https://info.orcid.org/documentation/member-portal/member-portal-affiliation-manager-guide/> & <https://info.orcid.org/documentation/integration-guide/admin-guide-to-affiliations/>

Option 4: Affiliation Manager - Workflow

Request access and read the documentation

- Request access from the Portal using the [form](#)
- Read the [Affiliation Manager Guide](#)

Use the CSV file

- Use the [csv template](#) available
- Complete the data
- Upload the data

Option 4: the CSV file



How to use this template: 1) Go to File > Make a Copy 2) Save to your workspace 3) Rename 4) Delete Row 1. For further instructions, visit our [Affiliation Manager Guide](#)

email	affiliation-sector	department-name	role-title	start-date	end-date	org-name	org-country	org-city	org-region	disambiguated-c	disambiguation-t	url
researcher01@r	employment	Psychology	Associate Professor	2014-04		University of Wis	US	Madison	WI	5228	RINGGOLD	https://wisc.edu
researcher02@r	employment	Biology	Assistant Professor	2015-08	2018-07	University of Wis	US	Madison	WI	5228	RINGGOLD	https://wisc.edu
researcher03@r	employment	Water Chemistry	Lab Manager	2014-04		University of Wis	US	Madison	WI	5228	RINGGOLD	https://wisc.edu
researcher04@r	employment	Biology	Professor	1996-08	2022-07	University of Wis	US	Madison	WI	5228	RINGGOLD	https://wisc.edu
student01@maili	education	School of Law	Master's degree	2007-10	2013-07	Trinity College D	IE	Dublin		grid.8217.c	GRID	https://www.tcd.ie/law/
person01@mailir	qualification	Cambridge Assessment English	CELTA	2021		University of Car	GB	Cambridge		2152	RINGGOLD	cambridgeenglish.org
person02@mailir	service	Steering Group for Technical Development	Group chair	2019-01	2021-08	DataCite	DE	Hannover		577715	RINGGOLD	https://datacite.org/
person03@mailir	service	Data repository	Data curator	2018-01		DataONE	US	Santa Barbara		145790	RINGGOLD	https://www.dataone.org/
person04@mailir	service	Centelha SP Program	Reviewer	2020		Sao Paulo Rese	BR	Sao Paulo		02ddkpn78	ROR	http://www.fapesp.br/en/
person04@mailir	membership		Associate Member	2017		Royal Society Te	NZ	Wellington		210126	RINGGOLD	https://www.royalsociety.org.nz/
person05@mailir	invited-position	Management of Science and Technology in Health	Visiting scholar	2019-01	2019-06	Fundacao Oswa	BR	Rio de Janeiro		37903	RINGGOLD	https://portal.fiocruz.br/
person06@mailir	distinction	Vice-rectorate for internationalization	Excellency in mobility award	2014		University of Græ	ES	Granada		04njy449	ROR	https://internacional.ugr.es/



**Implementing best practices
can make your ORCID
integration more useful for
everyone in your organization.**

1

Customize the user experience

2

Provide a workflow for users if they deny your system permission

3

Provide an option for users to remove their ORCID iD and data from your system

4

Update added items when corrections are needed

5

Provide descriptive error messages and a support contact to your users when an interaction does not go as expected

6

Display your ORCID member logo

7

Create a consistent user experience by associating the iD icon with a trusted assertion process

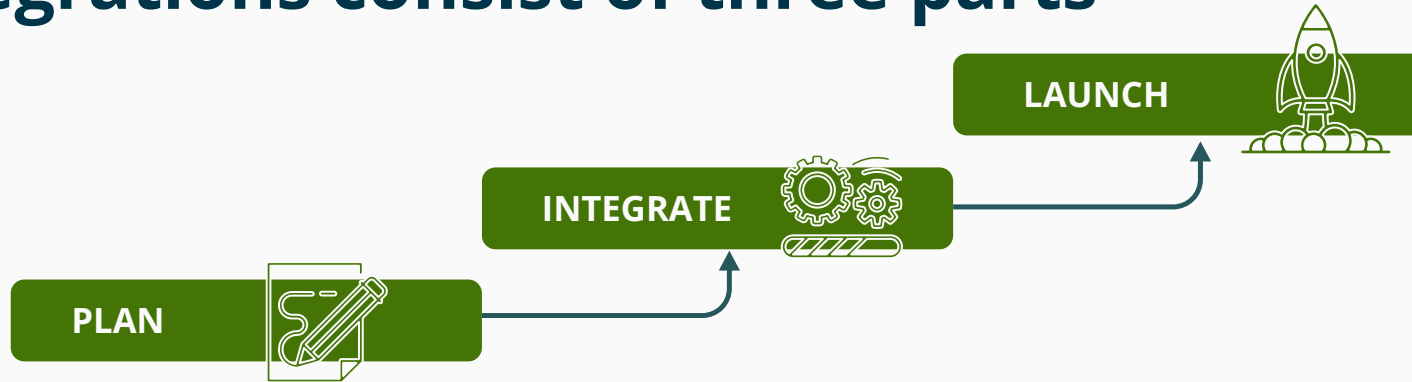
8

Use the access token to check for existing permissions



Successful approaches to ORCID integration

Integrations consist of three parts



Engage with your community throughout to prepare them for launch and to maximize organizational adoption.



Lay the groundwork for a solid integration plan

Involve the right people, right from the beginning

- Library, IT, Research Office, HR, others



Where does ORCID fit into your existing systems and workflows?

- Sign in – why not link your researchers' ORCID iDs?
- Account settings/user profile
- faculty review
- eThesis/Dissertation submission
- conference registration
- journal/paper review submission
- data repository submissions
- resources use application
- funding requests

Are you already using any of the vendor systems that support ORCID?



What kind of information do you want your integration to get, share, and use?



What information do you want to get from your researchers' ORCID records?

What information can you add to their ORCID records?

Asserting affiliations

Where will you display the ORCID iDs?

Do you want information in your system(s) and ORCID to be synchronized?

How are you going to get your organization to adopt your ORCID integration?

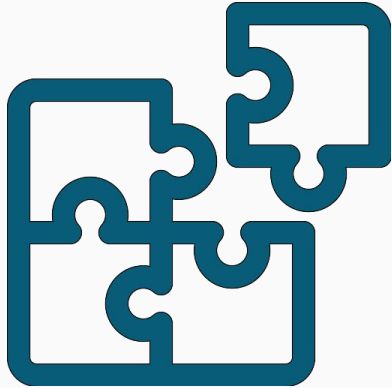


Whose ORCID iDs will you be collecting (faculty, students, staff, others)?

When and where will you ask for the iD (profile page, at annual review)?

How will you communicate with your researchers about ORCID and what will you tell them about your integration?

Take the first step to integrate



- Check to see if you have any systems that have [pre-built ORCID integrations](#)
- If you're interested in building a custom integration, check out [our documentation](#)
- If you're a consortium member, reach out to an Engagement Team lead to activate the [Affiliation Manager](#) and start writing affiliation data to your researchers' records.

Additional Resources

Step-by-step tutorial covering the basics of the API (3-legged-OAuth process, important API Calls) for custom integrations: <https://orcid.github.io/orcid-api-tutorial/>

Schemas and mapping:

https://github.com/ORCID/orcid-model/blob/master/src/main/resources/record_3.0/README.md#x-sds-and-current-state-all-stable

Webhook notifications:

<https://info.orcid.org/documentation/api-tutorials/api-tutorial-registering-a-notification-webhook/>

Q & A





Thank you for your attention