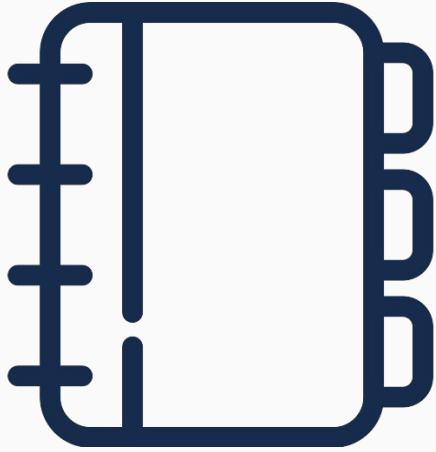




# Make the most out of using ORCID

*Ukrainian Consortium Meeting, 20th of December 2023*





**Brief overview of ORCID**



**ORCID as a researcher**



**Integrating with ORCID**



**Best practices depending on the system**



**Q & A**

# A brief overview of ORCID

# A Few ORCID Facts

- Independent not-for-profit open to participation by all
- Registry launched in 2012
- Sustained by fees from our member organizations
- Guided by our [values and founding principles](#)
- Community-governed by a Board of Directors representative of our membership





**ORCID's mission** is to enable transparent and trustworthy connections between researchers, their contributions, and their affiliations by providing a unique, persistent identifier for individuals to use as they engage in research, scholarship, and innovation activities.

*We've been doing this since 2012*

# ORCID provides three main services



## The ORCID iD

A unique, persistent identifier free of charge to researchers

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## An ORCID record

A digital profile connected to the ORCID iD, that can include employment, education, funding, peer review, research output and other metadata

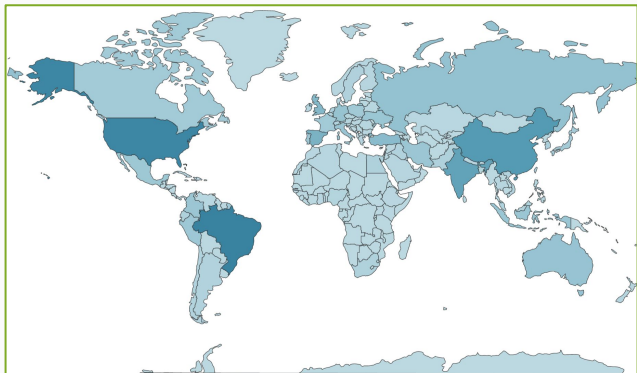
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## The ORCID APIs

A set of *Application Programming Interfaces* (APIs), as well as the services and support of communities of practice enabling interoperability between an ORCID record and member organizations

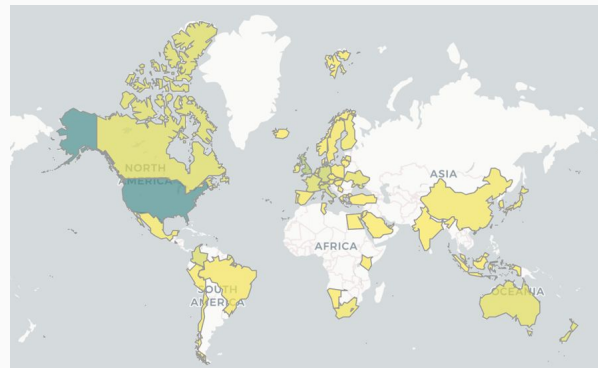
# We have broad adoption around the world



**Users in 250 countries**  
(That's every country on the planet  
apart from Niue, Norfolk Island, and  
Saint Pierre and Miquelon)

Yearly Active Researchers

**8 Million**



**Member organizations in 57 countries**  
(27 national consortia and 1 regional  
consortium)

Organizational  
Members

**1,361**

Active Integrated  
Systems

**5,396**



# Researchers are at the centre of everything we do

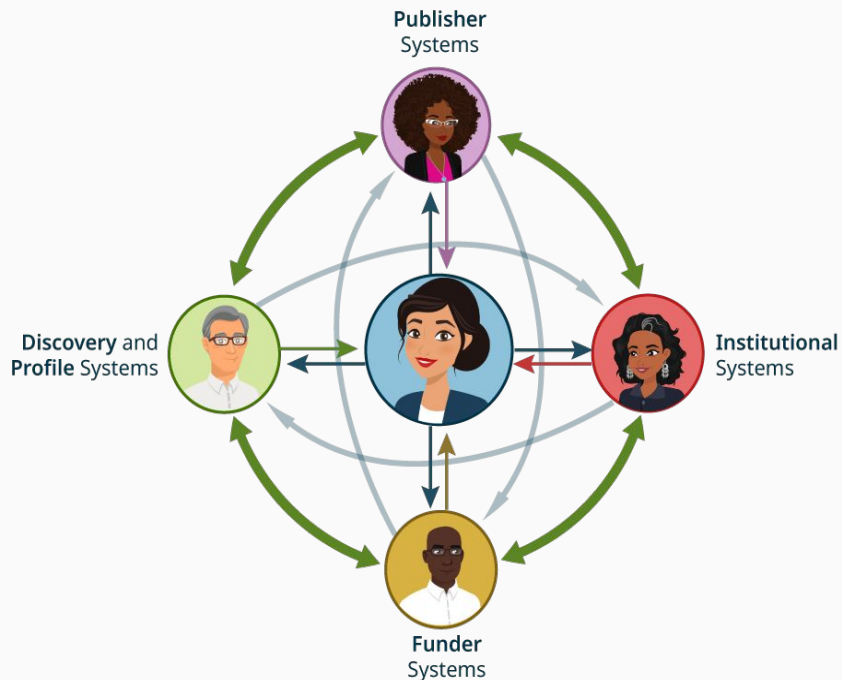
## In a nutshell:

Researchers securely share their IDs with the systems they interact with, proving them with their ID, and providing additional information.

These systems share information about researcher activities, creating a chain of validated and trusted assertions about researcher activity.

In these assertions, [Persistent Identifiers](#) (PIDs) are key.

The right person gets credit for the right research activities and is associated with the right institutions. *And it's automated.*

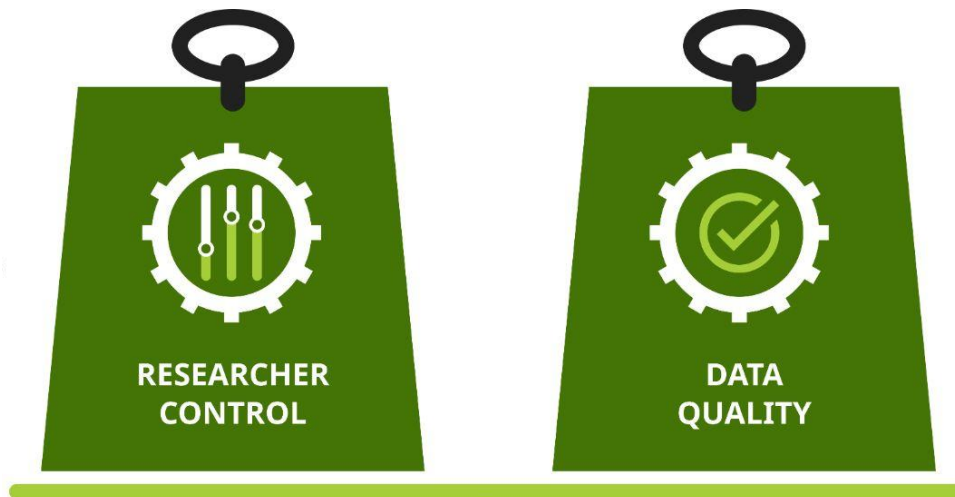




# We aim to balance researcher control and data quality

Researchers:

- Own their own records
- Control who accesses their information
- May change access preferences at any time



- Terms of use prevent misrepresentation
- False data in records may be disputed by anyone in the community
- Machine-learning algorithm detects obvious spam
- Disputed and spam records are removed from use, pending correction or withdrawal

Organizations may only add information to ORCID records with the researcher's permission, and may only update or delete information that was added by them



Trust in an ORCID record accumulates over time as reliable and trustworthy data sources add information (with the record holder's permission)

# ORCID as a researcher

# The ability to disambiguate researchers is critical for a trustworthy scholarly record

## 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.

RESEARCH ARTICLE

### Peta-electron volt gamma-ray emission from the Crab Nebula

The LHAASO Collaboration<sup>\*,†</sup>, Zhen Cao, F. Aharonian, Q. An, Axikegu, L. X. Bai, Y. X. Bai, Y. W. Bao, D. Bastieri, X. J. Bi, Y. Bi, H. Cai, J. T. Cai, Zhe Cao, J. Chang, J. F. Chang, B. M. Chen, E. S. Chen, J. Chen, Liang Chen, Liang Chen, Long Chen, M. J. Chen, M. L. Chen, Q. H. Chen, S. H. Chen, S. Z. Chen, T. L. Chen, X. L. Chen, Y. Chen, N. Cheng, Y. D. Cheng, S. W. Cui, X. H. Cui, Y. D. Cui, B. D'Elterre Piazzoli, B. Z. Dai, H. L. Dai, Z. G. Dai, Danzengluobu, D. della Volpe, X. J. Dong, K. K. Duan, J. H. Fan, Y. Z. Fan, Z. X. Fan, J. Fang, K. Fang, C. F. Feng, L. Feng, S. H. Feng, Y. L. Feng, B. Gao, C. D. Gao, L. Q. Gao, Q. Gao, W. Gao, M. M. Ge, L. S. Geng, G. H. Gong, Q. B. Gou, M. H. Gu, F. L. Guo, J. G. Guo, X. L. Guo, Y. Q. Guo, Y. Y. Guo, Y. A. Han, H. H. He, H. N. He, J. C. He, S. L. He, X. B. He, Y. He, M. Heller, J. K. Hor, C. Hou, H. Hou, H. B. Hu, S. Hu, S. C. Hu, X. J. Hu, D. H. Huang, Q. L. Huang, W. H. Huang, X. T. Huang, X. Y. Huang, Z. C. Huang, F. Ji, X. L. Ji, H. Y. Jia, K. Jiang, Z. J. Jiang, C. Jin, T. Ke, D. Kuleshov, K. Levochkin, B. B. Li, Cheng Li, Cong Li, F. Li, H. B. Li, H. C. Li, H. Y. Li, Jian Li, Jie Li, K. Li, W. L. Li, X. R. Li, Xin Li, Xin Li, Y. Li, Y. Z. Li, Zhe Li, Zhuo Li, E. W. Liang, Y. F. Liang, S. J. Lin, B. Liu, C. Liu, D. Liu, H. Liu, H. D. Liu, J. Liu, J. L. Liu, J. S. Liu, J. Y. Liu, M. Y. Liu, R. Y. Liu, S. M. Liu, W. Liu, Y. Liu, Y. N. Liu, Z. X. Liu, W. J. Long, R. Lu, H. K. Lv, B. Q. Ma, L. L. Ma, X. H. Ma, J. R. Mao, A. Masood, Z. Min, W. Mitthumsiri, T. Montaruli, Y. C. Nan, B. Y. Pang, P. Pattarakijwanchi, Z. Y. Pei, M. Y. Qi, Y. Q. Qi, B. Q. Qiao, J. J. Qin, D. Ruffolo, V. Rudev, A. Saiz, L. Shao, Q. Shchegolev, X. D. Sheng, J. Y. Shi, H. C. Song, Yu. V. Stenkin, V. Stepanov, Y. Su, Q. N. Sun, X. N. Sun, Z. B. Sun, P. H. T. Tam, Z. B. Tang, W. W. Tian, B. D. Wang, C. Wang, H. G. Wang, J. C. Wang, J. S. Wang, L. P. Wang, L. Y. Wang, R. N. Wang, Wei Wang, Wei Wang, X. G. Wang, X. J. Wang, X. Y. Wang, Y. D. Wang, Y. J. Wang, Y. P. Wang, Z. H. Wang, Z. X. Wang, Zhen Wang, Zheng Wang, D. M. Wei, J. J. Wei, Y. J. Wei, T. Wen, C. Y. Wu, H. R. Wu, S. Wu, W. X. Wu, X. F. Wu, S. Q. Xi, J. Xia, J. J. Xia, G. M. Xiang, D. X. Xiao, G. Xiao, H. B. Xiao, G. G. Xin, Y. L. Xin, Y. Xing, D. L. Xu, R. X. Xu, L. Xue, D. H. Yan, J. Z. Yan, C. W. Yang, F. F. Yang, J. Y. Yang, L. L. Yang, M. J. Yang, R. Z. Yang, S. B. Yang, Y. H. Yao, Z. G. Yao, Y. M. Ye, L. Q. Yin, N. Yin, X. H. You, Z. Y. You, Y. H. Yu, Q. Yuan, H. D. Zeng, T. X. Zeng, W. Zeng, Z. K. Zeng, M. Zha, X. X. Zhai, B. B. Zhang, H. M. Zhang, H. Y. Zhang, J. L. Zhang, J. W. Zhang, L. X. Zhang, Li Zhang, Lu Zhang, P. F. Zhang, P. P. Zhang, R. Zhang, S. R. Zhang, S. S. Zhang, X. Zhang, X. P. Zhang, Y. F. Zhang, Y. L. Zhang, Yi Zhang, Yong Zhang, B. Zhao, J. Zhao, L. Zhao, L. Z. Zhao, S. P. Zhao, F. Zheng, Y. Zheng, B. Zhou, H. Zhou, J. N. Zhou, P. Zhou, R. Zhou, X. X. Zhou, C. G. Zhu, F. R. Zhu, H. Zhu, K. J. Zhu, X. Zhu

8 | Virology | Research Article | 06 June 2022

### Trivalent NDV-HXP-S Vaccine Protects against Phylogenetically Distant SARS-CoV-2 Variants of Concern in Mice

Authors: Irene González-Domínguez, Jose Luis Martínez, Stefan Slamanig, Nicholas Lemus, Yonghong Liu, Tsoi Ying Lai, Juan Manuel Carreño, Gagandeep Singh, Gagandeep Singh, Michael Schotsaert, Ignacio Mena, Stephen McCroskery, Lynda Coughlan, Florian Hammer, Adolfo García-Sastre, Peter Palese, Weina Sun

SHOW FEWER | AUTHORS INFO & AFFILIATIONS

# ORCID also solves name variation

The diagram shows an ORCID iD profile for Karim Ben Romdhan. The profile includes the ORCID logo, the iD number (0000-0001-5727-2427), and a list of publications. The 'Also known as:' section lists variations of the name: K B Romdan, Karim B Romdhan, K Ben Romdhane, Karim Ben Romdhane, Karim Bin Romdhan, and Kerim Ben Romdhane. Three articles are shown as callouts, each linked to a specific publication entry in the profile:

- Article A:** K B Romdan
- Article B:** Karim B Romdhan
- Article C:** K Ben Romdhane

The profile also lists the following publications:

- Article A:** K B Romdan
- Article B:** Karim B Romdhan
- Article C:** K Ben Romdhane

# Registering for an iD is easy!

## iD Distinguish yourself

Add your biography to your ORCID record

### 1 Sign in!

Go to [ORCID.org/signin](https://orcid.org/signin) and sign in to your account.



### 2 Set up to edit

Select the **pencil icon** next to the Biography section.

Edit my version



*Even a brief bio can quickly distinguish you from other researchers with the same or similar name.*

### 3 Add your bio

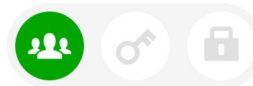
Type in or copy and paste your biography. Be sure to **save your changes**.

SAVE CHANGES



### 4 Set the visibility

Who can see your biography?  
**Everyone, trusted parties, or only you?**



Visit [orcid.org](https://orcid.org) for more

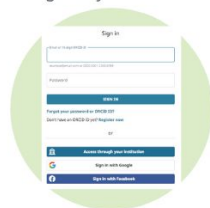
# Never forget to add an additional email



## ADD AN ADDITIONAL EMAIL TO YOUR ORCID RECORD

### Step 1: Sign In!

Go to [ORCID.org/signin](https://orcid.org/signin) and log into your account.



### Never get locked out!

Register at least two email addresses, including a permanent personal email so you don't lose access to your record.



### Step 2: Edit Email Preferences

In Account settings click **Edit** next to "Email and notification preferences".

#### Account settings

Email and notification preferences	Edit
Language display preferences	Edit
Password	Edit
Visibility preferences	Edit

### Step 3: Add YOUR Permanent Email

Add Another Email  Add

Type your permanent email in the **Add Another Email** field and click Add. A verification email will be sent to that address.

ORCID

VISIT [ORCID.ORG](https://orcid.org) FOR MORE

### Step 4: Verify and Set Privacy

Check your email and click the link to verify. In your record you can set your primary email and decide which can be seen by everyone, trusted parties, or just yourself.

#### Account settings

Email and notification preferences		Hide
<b>My email addresses</b>		
hernandez.garcia@emailinator.com	Make Primary	Verified
s.garcia@mailinator.com	Primary Email	Verified
sjgarcia.orcid@mailinator.com	Make Primary	Verify Email

# Use your ORCID iD to connect your research activities



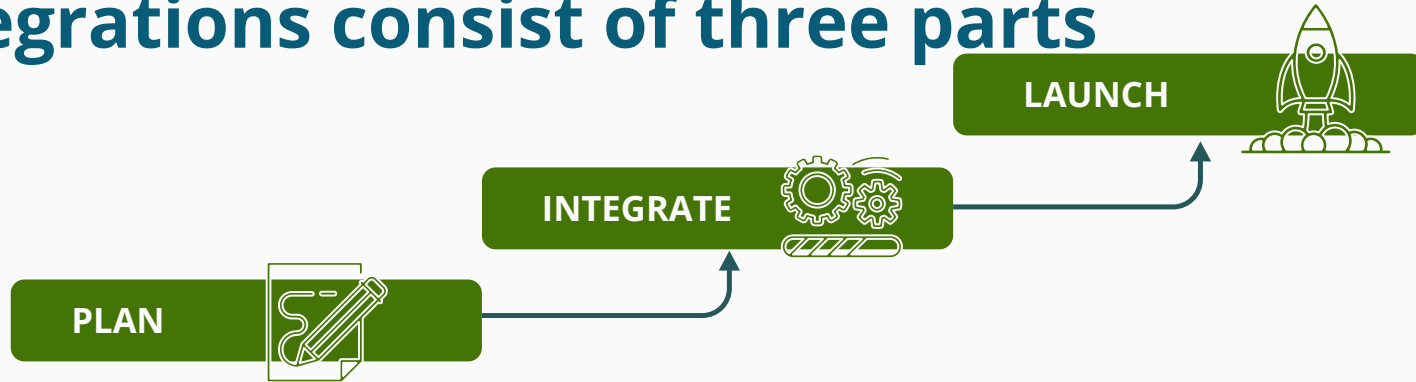
# Integrating with ORCID



# 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 (when using the member API).
- ✗ They are *not* a data look-up in the ORCID registry.

# Integrations consist of three parts



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



# Authentication is central in a user-controlled process

ORCID Authorize access

You are currently signed in as:

**Paloma Marín-Arraiza**  
<https://orcid.org/0000-0001-7460-7794>  
Sign out

**People @ FH Burgenland** ?

has asked for the following access to your ORCID record:

- 🔄 Add/update your research activities (works, affiliations, etc)
- 🔄 Add/update other information about you (country, keywords, etc.)
- 👁️ Read your information with visibility set to Trusted Organizations
- 🆔 Get your ORCID ID

**Authorize access**

Deny access

If authorized, this organization will have access to your ORCID record, as outlined above and described in further detail in [ORCID's privacy policy](#).

You can manage access permissions for this and other Trusted Organizations in your [account settings](#).

User logs in to their ORCID account to ensure the app connects to the correct ORCID iD.



Who is asking

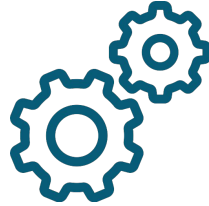
Which permissions are given



# How to integrate? / Three ways of doing it



Use an existing certified service provider (e.g. DSpace-CRIS, Symplectic Elements, OJS...)



Develop a custom integration (for self-developed institutional systems)



Adopt the Affiliation Manager (consortium members only)

Documentation: <https://info.orcid.org/documentation/integration-guide/>

Certified service providers: <https://info.orcid.org/vendors-and-service-providers/orcid-certified-service-providers-list/>

Affiliation Manager: <https://info.orcid.org/affiliation-manager/>

# ORCID Certified Service Providers

We re-launched our certification programme with best practice based requirements

Focus on 4 system types and the workflows they support

- Manuscript submission systems
- Research Information systems ←
- Repository systems
- Grant/facility application management systems

## Pilot Partners

4Science (DSpace-CRIS); Altum (Proposal Central); Aries (Editorial Manager); Cambia (The Lens); Digital Science (Symplectic Elements); Elsevier (Pure); ExLibris (Esploro); InfoEd (InfoEd); PKP (OJS und OPS); Royal Society Te Aparangi (The New Zealand ORCID Hub); SmartSimple (SmartSimple Cloud); Vidatum Technologies (Vidatum Academic); Watermark (Faculty Success)

# ORCID Certified Service Providers

- [Editorial Manager®](#)
- [Open Journal Systems \(OJS\)](#)
- [Open Preprint Systems \(OPS\)](#)
- [DSpace-CRIS](#)
- [Elements](#)
- [InfoEd Global](#)
- [ProposalCentral](#)
- [IRIS - Institutional Research Information System](#)

With many more working on certification



**Contact us if you want to learn more or get your system certified**

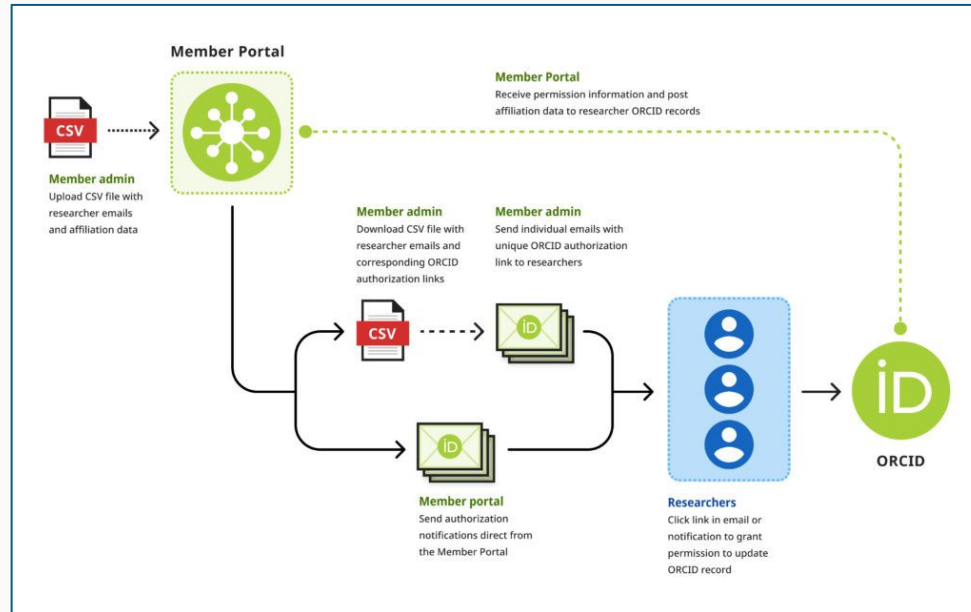
# Developing a custom integration can take more time and effort, but we're here to help.

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



On average our members refer to 45-60 hrs of technical work to launch a custom integration *including testing*

# Benefit from the Affiliation Manager, a tool without IT knowledge





# Integrating ORCID in repositories

# To bear in mind / Best practices for Repository Systems are always a guideline

Certified Repository System Providers **MUST**:

- Allow sign-in with ORCID iD and authenticate author's/contributor's ORCID iD
- Allow administrators to collect authenticated iDs and permission where metadata includes non-authenticated iDs
- Collect authenticated ORCID iDs from contributors
- Make sure ORCID iDs are displayed on hosted research outputs
- Make sure hosted research outputs are added to authors' ORCID records
- Include authenticated ORCID iDs in any metadata passed downstream
- Enable ORCID member organizations to use their own ORCID membership credentials when configuring the system
- Document how platform users can use the ORCID functionality offered in training and promotional materials

# To bear in mind / Best practices for Repository Systems are always a guideline

Certified Repository System Providers **SHOULD**:

- Use data from ORCID records to populate researcher profiles (if applicable)

Certified Repository System Providers **MAY**:

- Allow administrators to associate ORCID iDs with [authors/contributors](#)

# Integrating ORCID in manuscript systems

# To bear in mind / Best practices for Manuscript submissions Systems are always a guideline

Certified Manuscript submissions systems Providers **MUST**:

- Allow sign-in with ORCID iD and authenticate corresponding author and reviewed ORCID iDs
- Use data from ORCID records to make registration and submission easier
- Display authors' and reviewers' ORCID iDs to editors to make editing easier
- Collect authenticated ORCID iDs from [co-authors/collaborators](#)
- Collect authenticated ORCID iDs from reviewers
- Add peer review items to reviewers' ORCID records
- Include authenticated ORCID iDs in the metadata passed downstream
- Make sure works are added to ORCID records when they're published
- Enable ORCID member organizations to use their own ORCID membership credentials when configuring the system
- Document how platform users can use the ORCID functionality offered in training and promotional materials



# To bear in mind / Best practices for Research Information Systems are always a guideline

Certified Manuscript submissions systems Providers **SHOULD**:

- Make sure authenticated ORCID iDs are displayed on published articles (if applicable)

Certified Manuscript submissions systems Providers **MAY**:

- Collect authenticated ORCID iDs for editors and conference organizers and add professional service items to their ORCID records

# Integrating ORCID in CRIS

# To bear in mind / Best practices for Research Information Systems are always a guideline

Certified Research Information System Providers **MUST**:

- Collect authenticated researchers' ORCID iD and permissions
- Display iDs of researchers
- Use data from ORCID records to populate researcher profiles and discover new researcher activity
- Add employment/education information to researchers' ORCID records
- Add works to researchers' ORCID records (if applicable)
- Add funding awards to researchers' ORCID records (if applicable)
- Enable ORCID member organizations to use their own ORCID membership credentials when configuring the system
- Document how platform users can use the ORCID functionality offered in training and promotional materials





# To bear in mind / Best practices for Research Information Systems are always a guideline

Certified Research Information System Providers **SHOULD**:

- Add a link to the researchers' profile in the Research Information System to their ORCID record

Certified Research Information System Providers **MAY**:

- Add an affiliation to visiting researchers' ORCID records
- Allow administrators to associate ORCID iDs with [authors/contributors](#)





Thank you very much!  
Красно дякую!

Reach out to us at [membersupport@orcid.org](mailto:membersupport@orcid.org)

