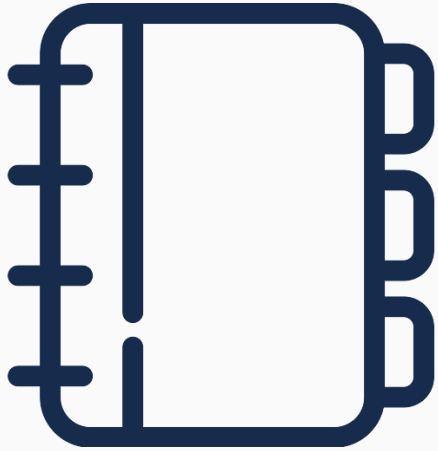




Integrating ORCID in institutional and national CRIS

euroCRIS meeting, 22nd-23rd of November 2023





Brief overview of ORCID



Integrating with ORCID



Integrating with ORCID in CRIS



Institutional and national cases



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



An ORCID record

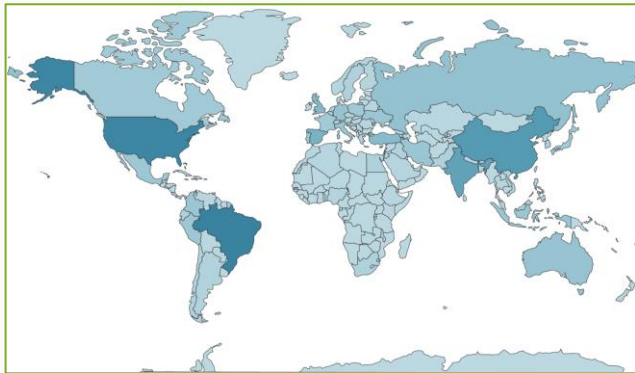
A digital profile connected to the ORCID iD, that can include employment, education, funding, peer review, research output and other metadata



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

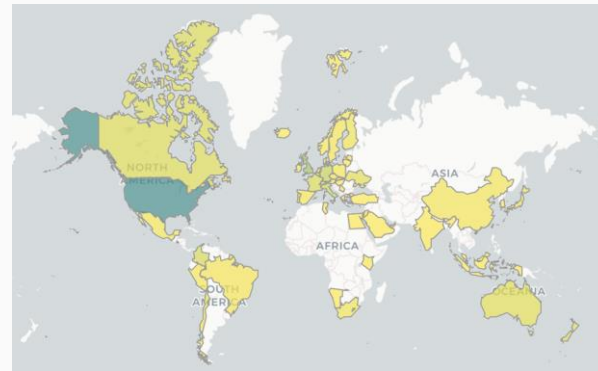
We have broad adoption around the world



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

1,355

Active Integrated
Systems

5,322



Researchers are at the centre of everything we do

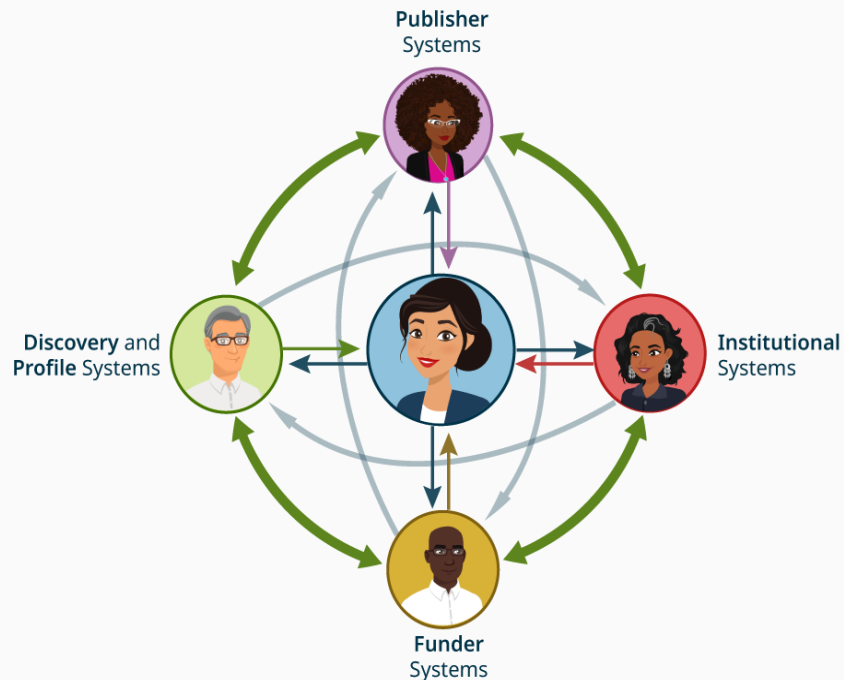
In a nutshell:

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.

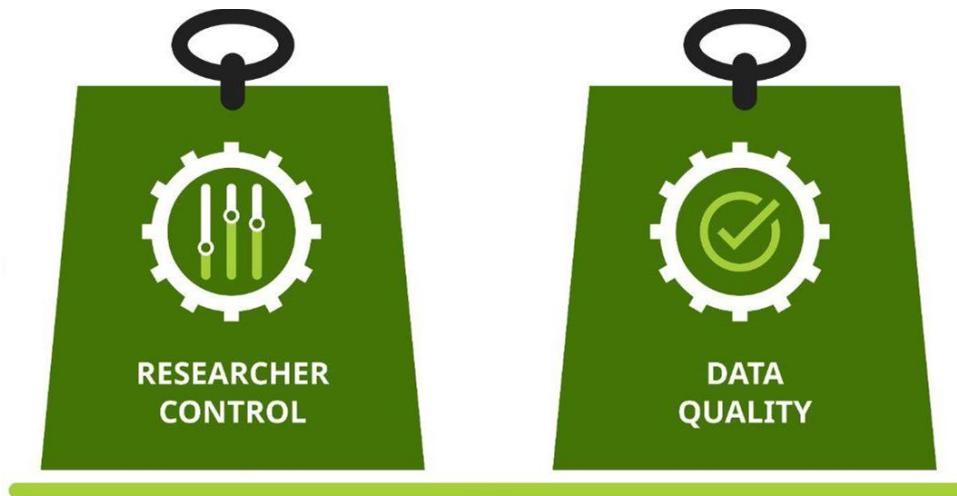
The right person gets credit for the right research activities and is associated with the right institutions. *And it's automated.*



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)

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.

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*

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](#)



Institutional and national examples

At an institutional level...

DSPACE-CRIS - ORCID connections at the Universität Bamberg (Germany)

The screenshot shows the FIS (Forschungsinformationssystem) profile page for Steffen Illig at the University of Bamberg. The page features a dark blue header with the university logo and navigation icons. Below the header, there is a breadcrumb trail: Home > Research Entities > Person > Illig, Steffen. A 'Back to Results' button is visible. The main content area includes a profile picture of Steffen Illig and his name. Below this, there are tabs for Profile, Publications, Researchdata, Projects, and Achievements. The 'Profile' tab is active, displaying the following information:

Name	Illig, Steffen
Department	University Library
Email	steffen.illig@uni-bamberg.de
ORCID	0000-0002-5570-7746

The screenshot shows a DSpace CRIS record for Otto-Friedrich-Universität Bamberg. The record is titled 'Otto-Friedrich-Universität Bamberg: Bamberg, DE' and is categorized under 'Employment'. It includes the following information:

- Organization Identifiers:** GRID: grid.7359.8, University of Bamberg: Bamberg, DE, <https://www.uni-bamberg.de/>
- Other organization identifiers provided by GRID:** ISNI: 0000000123254853, ORGREF: 530313, ROR: <https://ror.org/01c1w6d29>, WIKIDATA: [Q707272](https://www.wikidata.org/wiki/Q707272), WIKIPEDIA_URL: http://en.wikipedia.org/wiki/University_of_Bamberg (preferred)
- Added:** 2020-10-01
- Last modified:** 2020-10-01

The source is listed as Otto-Friedrich-Universität Bamberg. Below this, there is a section titled 'Schnell zur Submission : Wege & Importe in DSpace verbessern' with a 'Show more detail' link. The content of this section includes:

- DSpace Praxistreffen, 23. und 24. März 2023
- 2023-01-01 | Conference paper | Author
- URI: [uniba/58951](https://nbn-resolving.org/urn:nbn:de:bvb:473-irb-589518)
- URN: [urn:nbn:de:bvb:473-irb-589518](https://nbn-resolving.org/urn:nbn:de:bvb:473-irb-589518)
- CONTRIBUTORS: Steffen Illig; Philipp Rumpf; Johanna Staudinger

The source is again listed as Otto-Friedrich-Universität Bamberg.

 Source: <https://orcid.org/0000-0002-5570-7746>



Data are asserted to the Employment, Education and the Works sections, adding a **Trust marker**

PURE - ORCID connections at the Universitat Autònoma de Barcelona (Spain)

UAB

Universitat Autònoma de Barcelona

Home **Profiles** Research units Projects Research output Datasets Student theses



Maria Pilar Lopez Belbeze

Associate Professor
Entrepreneurship, Management and Performance Group (EMPg)
CRIEDO Centre de Recerca i Estudis pel Desenvolupament Organitzatiu
Department of Business
<https://orcid.org/0000-0002-4302-3005>

Contact expert

View Scopus Profile

Plaça del coneixement , G6/247
08193 Bellaterra (Cerdanyola del Vallès)
Spain

Accepting PhD Students

<https://orcid.org/0000-0002-4302-3005>

Websites & social links

Business department
Master Universitario de Marketing
Universitat Autònoma de Barcelona
(UAB) profile page

Other IDs

ResearcherID: K-2609-2017
ScopusProfiles: 1470282
Scopus Author ID: 57205730477
Scopus ID: 57205730477

Keywords

brand equity, brand strategy,
consumer behavior

Is this you? [Sign in to start editing](#) Printable version

Name
Pilar Lopez

Activities Collapse all

▼ **Employment (2)** Sort

Universitat Autònoma de Barcelona (UAB): Bellaterra (Cerdanyola del Vallès), ES

Employment Show less detail

Organization Identifiers
RINGGOLD: 16719
Universitat Autònoma de Barcelona: Barcelona, Catalunya, ES

Other organization identifiers provided by RINGGOLD
ISNI: [0000000120970205](https://orcid.org/0000000120970205)
ORF: <http://dx.doi.org/10.13039/501100011104>

Added
2021-01-19

Last modified
2021-01-19

Source: Universitat Autònoma de Barcelona

Private label and manufacturer brand choice in a new competitive reality: Using segmentation to capture divergent consumer behavior types Show more detail

European Journal of Marketing
2019 | Journal article | *Author*
DOI: <https://doi.org/10.1016/j.emj.2018.05.003>
SOURCE-WORK-ID: fd6905f9-e2c9-4a2e-9ab2-364b2bb5c207
CONTRIBUTORS: A. Cuneo; S. Milberg; MC del Amo; Pilar Lopez

Source:



Data are asserted to the Employment, Education, Works, Websites and other IDs sections, adding a **Trust marker**

At a national level...

The Finnish CRIS, Research.fi, uses ORCID to facilitate metadata reusability

“ORCID iDs will play a central role here. In 2021, the service will introduce a dedicated ‘my data service’, which enables researchers to create their profiles in Research.fi by signing in with their ORCID accounts. To avoid ‘yet another profile to maintain’, no content will be entered or edited manually but will be transferred from existing sources”.

Researcher's Profile Tool Log in In English ▾

Compile a public profile of your data in the Research.fi service

Using the Researcher's Profile Tool, you can compile a public profile in the Research.fi service from information in your ORCID profile and your home organisation. In the tool, you can preview the information before it is published and select only the information that you want to be part of your profile.

New user? Start here:

[Create Profile](#)

Additional information:

[Quickstart guide](#)

[Already have a profile?](#)

Diagram Description: A browser window titled 'RESEARCH.FI' displays a user profile page. The profile is linked to an 'ORCID' account (indicated by an 'iD' icon) and an 'ORGANISATION' (indicated by a building icon). The profile page has sections for 'Profile' and 'Publications', both containing placeholder text.



The Serbian CRIS, eNauka, strongly promotes ORCID authentication



eHAYKA

RESEARCHERS ORGANISATIONS RESULTS STATISTICS

Sign on to

Српски

Log In

For researchers

ORCID Login

Short guides: [Basic information \(text\)](#)
[eScience in 10 minutes \(video\)](#)

The researcher logs into eScience exclusively through the ORCID system, using his ORCID ID identification and password.

The researcher independently registers in ORCID, while the registration of researchers in eScience is carried out by the NIO officer, by entering ORCID identification and other administrative data of the researcher.

The name of the authorized NIO referent is publicly available within the detailed data on the NIO profile in eScience.

For NIO editors

E-mail:

Password:

Have you forgotten your password? [Log In](#)

The NIO editor is responsible for the accuracy and quality of the data within his NIO, including data on scientific results posted by researchers.

The name of the authorized NIO editor is publicly available within the detailed data on the NIO profile in eScience.



Sources: <http://opensciencefair.eu/posters/level-of-openness-in-serbian-science-potentials-of-enauka-national-cris>
<https://nitra.gov.rs/lat/ministarstvo/vesti/srbija-je-clanica-orcid-a>

Our work doesn't stop here

We keep working to support trustworthy connections between ORCID and (institutional and national) CRIS

- Continuous work with CRIS service providers
- Continuous work with national CRIS instances worldwide (Peruvian CRIS, Ukrainian CRIS, Norwegian CRIS...)
- Continuous support to custom CRIS solutions





Thank you very much
Muchas gracias
Eskerrik asko

euroCRIS meeting, 22nd-23rd of November 2023