Working together to make ORCID work for repositories

ORCID in repositories task force

Open Repositories 2019 | Hamburg, June 2019
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slides: https://orcid.figshare.com

ORCiD | Connecting Research and Researchers

ORCiD.org

About this time last year...

A brief history of ORCID in repositories...

Repositories have been on our minds at ORCID since the beginning

Our goal: Help make scholarly communication workflows easier for everyone…enter once, reuse often

Where does ORCID fit?

Author disambiguation
Connect iDs to repository author profiles

Discovery Export to ORCID, so ORCID users and data consumers can access

Ingest Import new items from ORCID

THEN (2014)

Author disambiguation
Connect iDs to authors/contributors in the repository

~~**Discovery** Explore ~~ ~~Users and data consumers can access?~~

Not many systems using ORCID yet, so no one to find things you put there

~~**Ingest** Import new items from ORCID?~~

Not much data in ORCID yet, so nothing to ingest

DSpace (U of Missouri / Atmire)

Became part of DSpace v5 (2015)
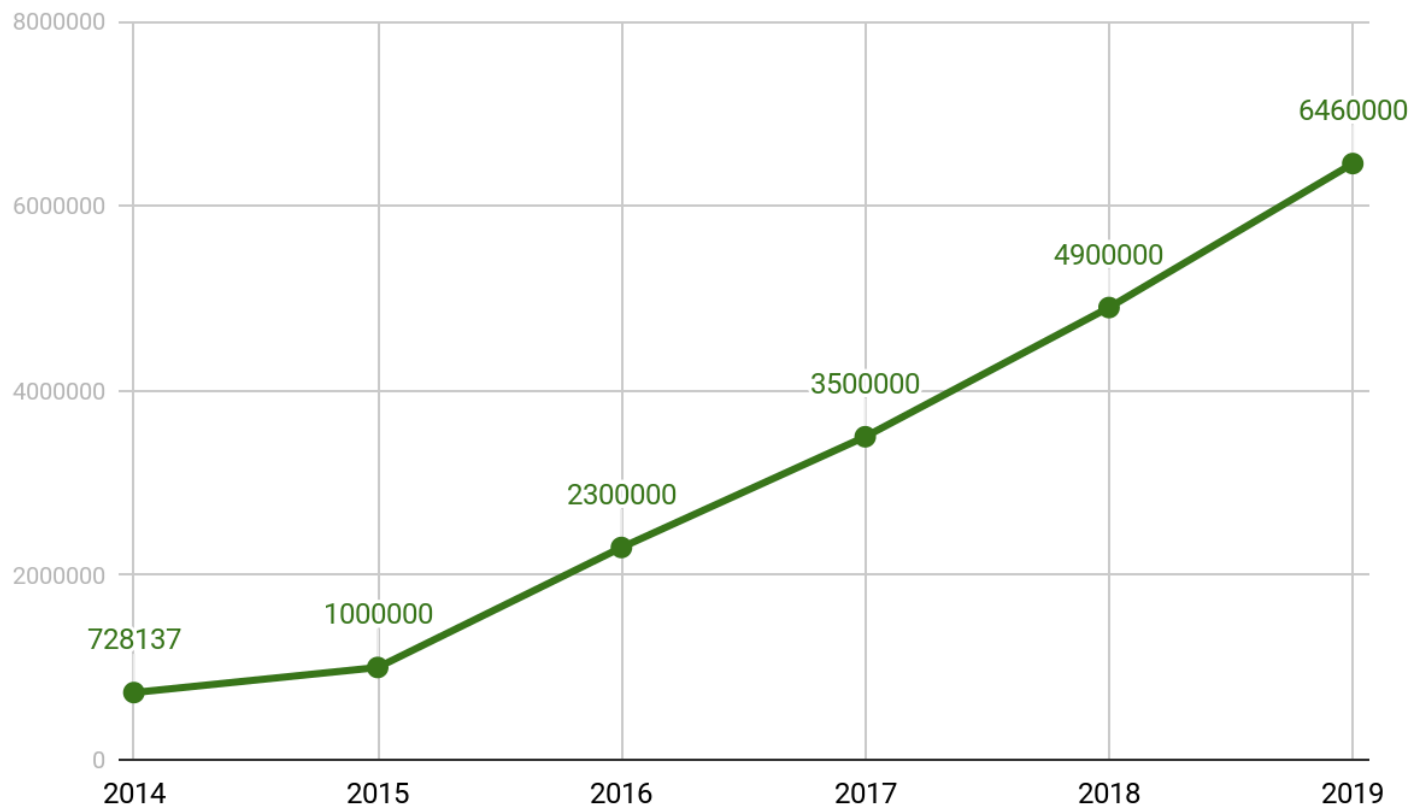
Batch update author iDs from CSV file

Search for author in ORCID
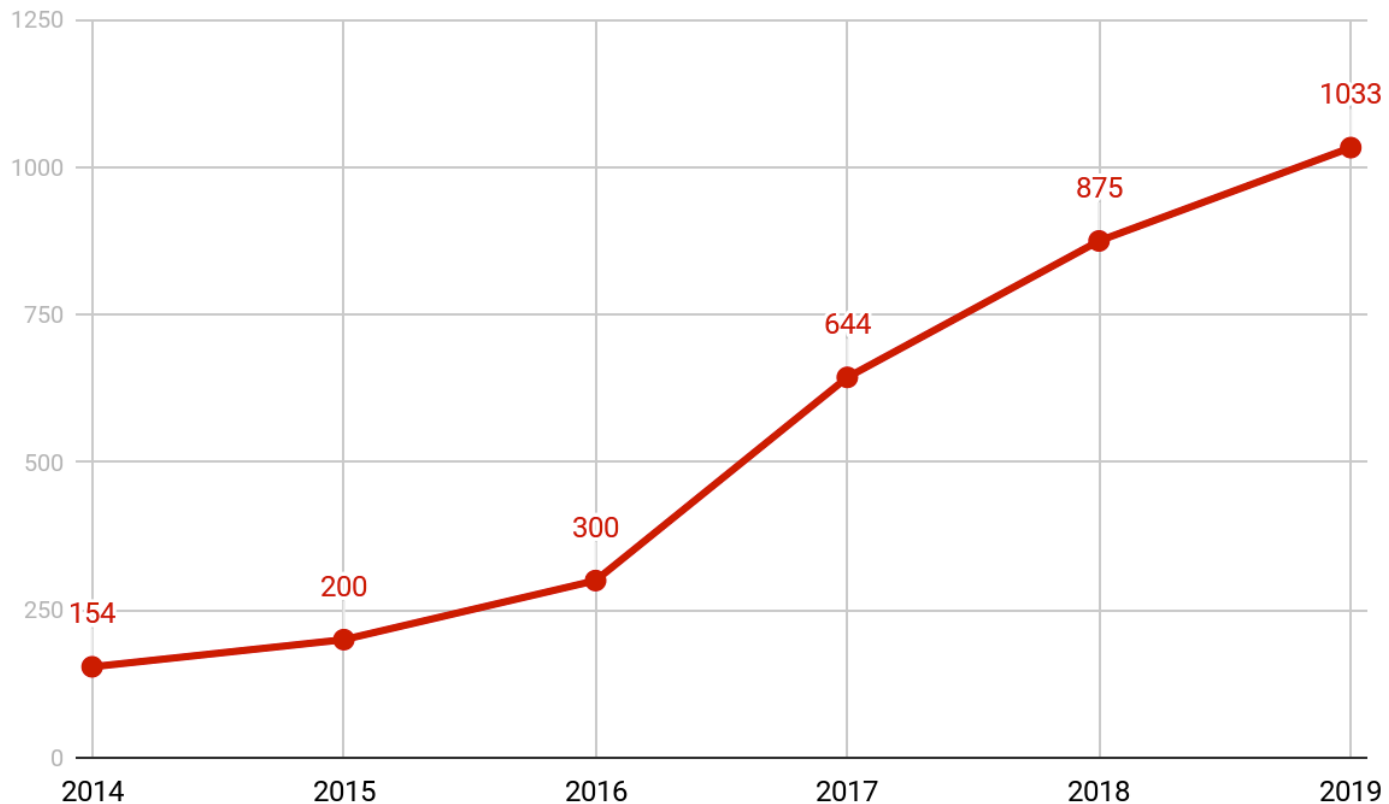
A whole lot has changed since then!
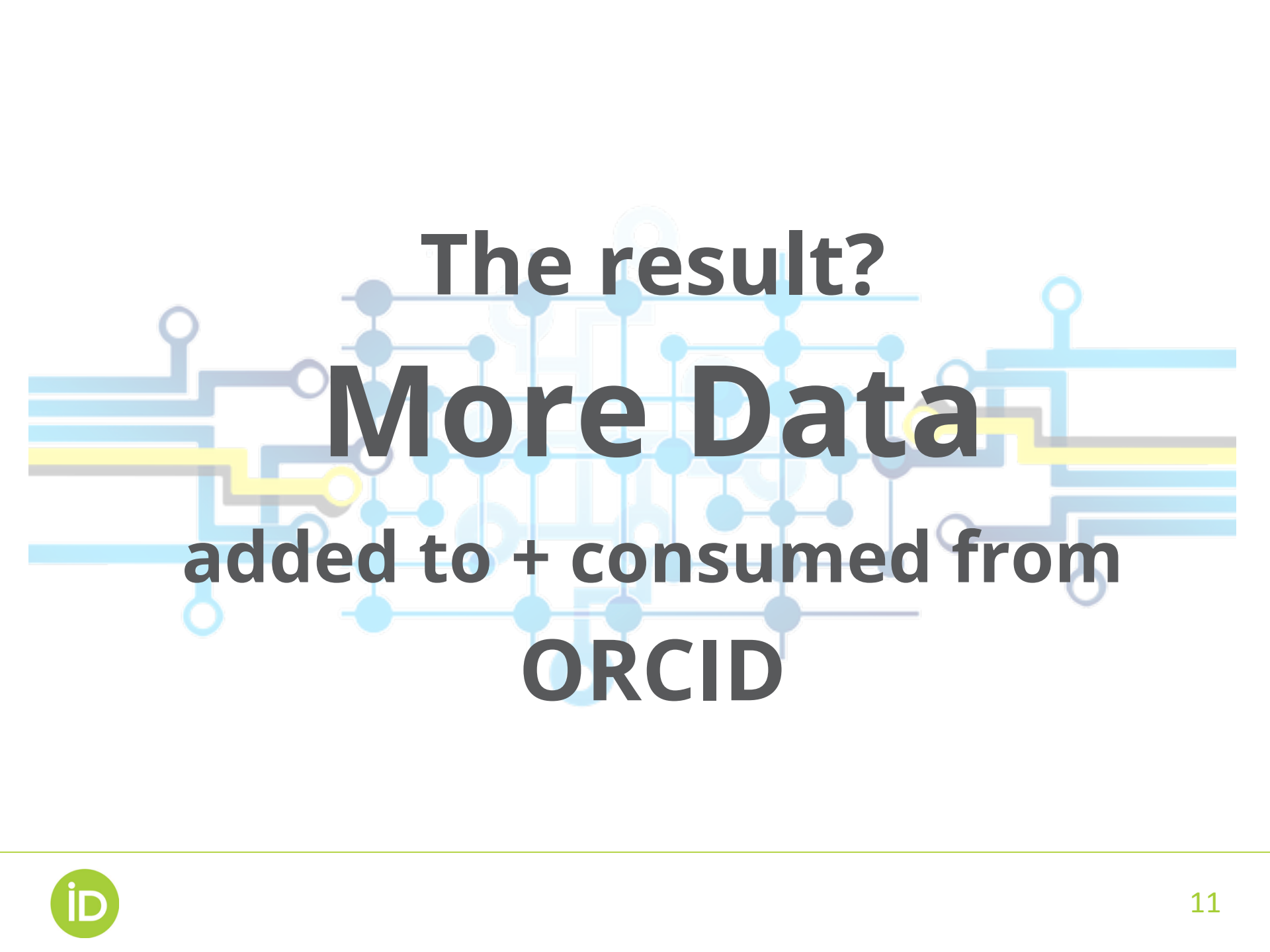
Fancy charts 2014-2019
Live ORCID iDs

Fancy charts 2014-2019
ORCID member organizations

The result?

More Data

added to + consumed from

ORCID

NOW

More things are possible!

Author disambiguation
Connect iDs to repository author profiles

Discovery Export to ORCID, so ORCID users and data consumers can access

Ingest Import new items from ORCID

A new generation of repository integrations

University of New England

e-publications@UNE Fedora + custom ORCID app

ORCID iD | Exit Wizard | Back | Next

1 Create or connect your ORCID iD

Chute uses your ORCID iD to identify your research. Please create or connect your ORCID iD by selecting the Cr... or connect your ORCID iD button below.

The options are:

○ **Link my ORCID iD**: Your ORCID iD will be recorded in e-publications@UNE
○ **Read new works from my ORCID Record**: Chute will add new records from ORCID to your e-publications@UNE Incomplete submissions.
○ **Keep my ORCID Record up-to-date**: Chute will be able to add e-publications@UNE records to your ORCID Record.

We recommend that you select all of these. If you d...

Please choose
☑ *Link my ORCID iD
☑ Read new works from my ORCID Record
☑ Keep my ORCID Record up-to-date

iD Create or connect your ORCID iD

Preview and Action Your Research Outputs | Claim Research Output | Reject Research Output

Listed below are research outputs that are awaiting your action.

To action these records check the 'select' box and use the 'Claim Research Output' or 'Reject Research Output' buttons above. Claimed research outputs will be sent to your e-publications@UNE Incomplete submissions list for you to complete.

☑ Yes Chute should continue to keep my ORCID Record
☑ Yes Chute should continue to read new works from

User creates/connects ORCID iD to profile

New publications harvested from ORCID & other sources appear as incomplete submissions; user is prompted to log in and complete.

User can choose to allow UNE to update ORCID with any missing publications

ePrints Plugin (JISC / EPrints Services)

https://wiki.eprints.org/w/ORCID_Support#ORCID_Support_Advance

User creates/connects ORCID iD to profile

iD shown in all locations where author info is displayed

ePrints Plugin (JISC / EPrints Services)

https://wiki.eprints.org/w/ORCID_Support#ORCID_Support_Advance

Users or admins can import records from ORCID

...and export records to ORCID

16

DSpace-CRIS

https://wiki.duraspace.org/display/DSPACECRIS/ORCID+Integration

ORCID Authorizations

ORCID iD Not Yet

Create an ORCID iD   [iD]   Connect to ORCID iD

User creates/connects ORCID iD to profile

Preferred, name

The changes to the Edit Personal Information Tab has been saved

ORCID   Other

Network Lab | View Statistics | Email Alert | RSS Feed | Edit Researcher Page | ⚙▾

iD displayed on researcher page

| | Credit Name | Preferred, name | Full Name | DSpace-CRIS, Researcher | Vernacular Name | Some Additional, names |

ORCID   0000-0002-9421-192X

Biography

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum

DSpace-CRIS

https://wiki.duraspace.org/display/DSPACECRIS/ORCID+Integration

Data synchronization between ORCID and DSpace-CRIS

That's great news!

…if you're using ePrints or DSpace-CRIS, have vast software development resources, or are some kind of wizard

If not, then what???

What can we do?

Let's get together!

ORCID in repositories Task Force
Aug - Dec 2018

- Define common community needs around ORCID in repository software platforms
- Publish recommendations

Task force participants

15 members from 12 countries

(from a pool of 40+ applicants)
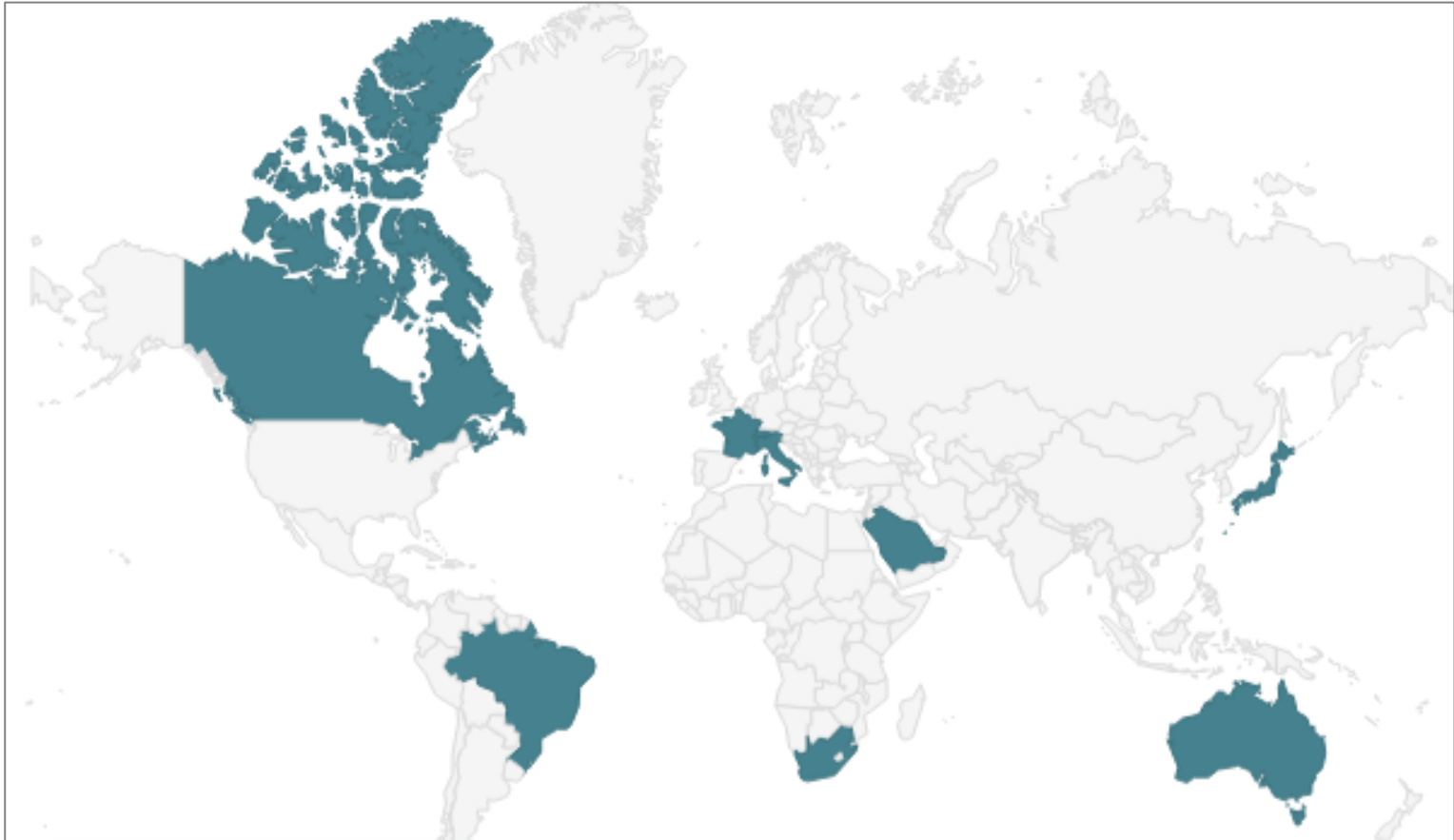
Task force participants

- **Wesley Barry**, TENET, South Africa
- **Paola Galimberti**, University of Milan, Italy
- **Stephen Grace**, London South Bank University, UK
- **Daryl M. Grenz,** KAUST, Saudi Arabia
- **Masaharu Hayashi**, National Institute of Informatics, Japan
- **Salwa Ismail**, Georgetown University, USA
- **Bénédicte Kuntziger/Agnès Magron**, CCSD, France
- **Michele Mennielli**, Duraspace, USA (Chair)
- **Lars Holm Nielsen**, CERN, Switzerland
- **Sheila Rabun**, LYRASIS, USA
- **Andrea Szwajcer**, University of Manitoba, Canada
- **Washington R. de Carvalho Segundo**, IBICT, Brazil
- **Alicia Starr** Avondale College of Higher Education, Australia
- **Irine Tanudjaja,** National University of Singapore, Singapore
- **John Westbrook**, RCSB, Protein Data Bank, USA

Process

- **Aug 2018:** Reviewed JISC ePrints spec

- **Sept 2018:** Prepared draft recommendation

- **Oct/Nov 2018:** Public comment period (~30 participants!)

- **Dec 2018:** Reviewed public comments & prepared final recommendation

- **Feb 2019:** Released final recommendations https://tinyurl.com/y2b7w7sz

Recommendations

The task force recommends that repository software platforms developed for distribution to others support these ORCID functions:

Collect ORCID iDs

Display ORCID iDs

Exchange data with ORCID

Include iDs in machine-readable outputs

Configuration options + reporting tools
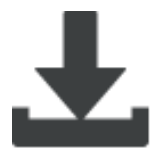
⬇ Collect ORCID iDs

- **Support collecting authenticated ORCID iDs**
  which means that users sign into ORCID and authorize the
  repository to obtain their iD (and, optionally, update permission)

- **Support other ways of obtaining ORCID iDs**
  Including in mediated deposits, bulk uploads by repository
  managers, and automated deposits from other systems

- **Allow admins to request authenticated iDs**
  and ORCID record update permission from authors and co-
  authors, in cases where iDs are missing or have not been
  authenticated

Display ORCID iDs

Support displaying ORCID iDs wherever user/ contributor information is displayed

- iD icon followed by the full iD URI, inked to the iD URI:
  https://orcid.org/0000-0002-1825-0097

- iD icon, hyperlinked to the iD URI:

- iD URI, hyperlinked to the iD URI: https://orcid.org/ 0000-0002-1825-0097

Exchange data with ORCID

- **Push/pull functionality should be configurable**

- **Admins should be able to:**

  - Enable/disable the functionality

  - Choose whether users or only admins can import/export data

  - Choose to pull data only for authenticated iDs (pushing data requires an authenticated iD)

  - Choose which types of data to push/pull

  - Choose to exchange data on demand (one-time) or automatically, on a regular basis

⬇⬆ Exchange data with ORCID

- **If the system allows users to control ORCID push/pull, also users to configure settings, including:**

  - Enable/disable the functionality

  - Choose to exchange data on demand (one-time) or automatically, on a regular basis

Machine-readable outputs

- **Support exposing ORCID iDs in metadata outputs**, such as OAI-PMH XML, wherever possible

- **Express ORCID iDs according to standards/best-practices** whenever possible (RIOXX, OpenAIRE, DCMI, etc)

```
<datacite:creators>
  <datacite:creator>
    <datacite:creatorName>Evans, R.J.</datacite:creatorName>
    <datacite:affiliation>Institute of Science and Technology</datacite:affiliation>
    <datacite:nameIdentifier nameIdentifierScheme="ORCID"
              schemeURI="http://orcid.org">
      1234-1234-1234-1234
    </datacite:nameIdentifier>
  </datacite:creator>
</datacite:creators>
```

⚙ **Configuration options + reporting tools**

- **Provide testing, logging and reporting features for administrators**

  - Connect to ORCID public **OR** member API

  - Connect to ORCID production **OR** sandbox test site

  - Export report of stored ORCID iDs, access tokens, etc

- **Provide documentation about ORCID features, for both administrators and end users**

Now what?

ORCID is working on:

- Engagement and advocacy w/vendors and developers

- Documentation/support for developers implementing recommendations

Look for updates on https://orcid.org/about/news!

What now?

Status updates:

- **DSpace:** It's all about Entities; sometime after DSpace 7

- **Digital Commons:** Exploration happening now; detailed plans TBD

What now?

What can you do?

- **Vendors/developers:** Check out the recommendations and contact ORCID for guidance and support

- **Implementers:** Contact your vendor or open-source community!

Resources

- Task force recommendations: https://doi.org/10.23640/07243.7777274

- [Blog post](#) about the recommendations

- [Task force charter](#)

Thanks!

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

Slides: https://orcid.figshare.com