ORCID SYMPLECTIC ELEMENTS WEBINAR

13 May 2020 |Asia Pacific session

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ORCID | Connecting Research and Researchers

ORCID.org

Topics

Welcome

ORCID & Symplectic at a glimpse

Brian Minihan, ORCID, Engagement Lead, Asia Pacific

ORCID & Symplectic Elements

Julia Hawks, Symplectic, Senior Vice President, Strategy & Business Development

with Leonie Hayes, Symplectic, Client Support Manager, Asia Pacific

Symplectic Elements within Australia ORCID Consortium

Melroy Almeida, Technical Support Analyst, Australian Access Federation

iD

ORCID & Symplectic Elements at a glimpse

BRIAN MINIHAN ENGAGEMENT LEAD, OCEANIA & HONG KONG
https://orcid.org/0000-0001-8412-717X

ORCID | Connecting Research and Researchers

ORCID.org

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.

Executive

Laure Haak
Executive Director

Julie Balter
Executive Assistant

Operations

Sarah Hershberger
Director, Operations

Emilia Kutrovska
Project Manager

Padma Gopinath
Accountant

Stephanie Harley
Events Coordinator

HR Manager

Engagement

Ivo Wijnbergen
Director, Engagement

Estelle Cheng
APAC Manager

Camillia Lu
APAC Lead

Brian Minihan
APAC Lead

Shawna Sadler
Americas Manager

Ana Paty Cardoso
Americas Lead

Ana Heredia
Americas Lead

Gabriela Mejias
EMEA Manager

Nabil Ksibi
EMEA Lead

Paloma Marin-Arraiza
EMEA Lead

Product

Tom Demeranville
Director, Product

Paula Demain
Product Mgr

Dan Dineen
UX Specialist

Communications

Julie Petro
Director, Comms

Bernette Sherman
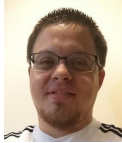Writer

Rob Blackburn
Web Producer

Katrina Willis
Comms Specialist

Technology

Will Simpson
Director, Technology

Liz Krznarich
Tech Lead, New Projects

Tech - Registry Services

Angel Montenegro
Tech Lead, Registry

George Nash
Sr. Software Developer

Leo Mendoza
Front End Developer

Daniel Palafox
Full Stack Engineer

Giles Westwood
Devops Engineer

Camelia Dumitru
Back-End Engineer

Tech - Researcher Services

Cat Wilmers
Lead, Researcher Services

Pedro Costa
QA and API User Support

Timothy Ho
User Support Specialist

Mitra Najafi-Gheidari
Senior User Support Specialist
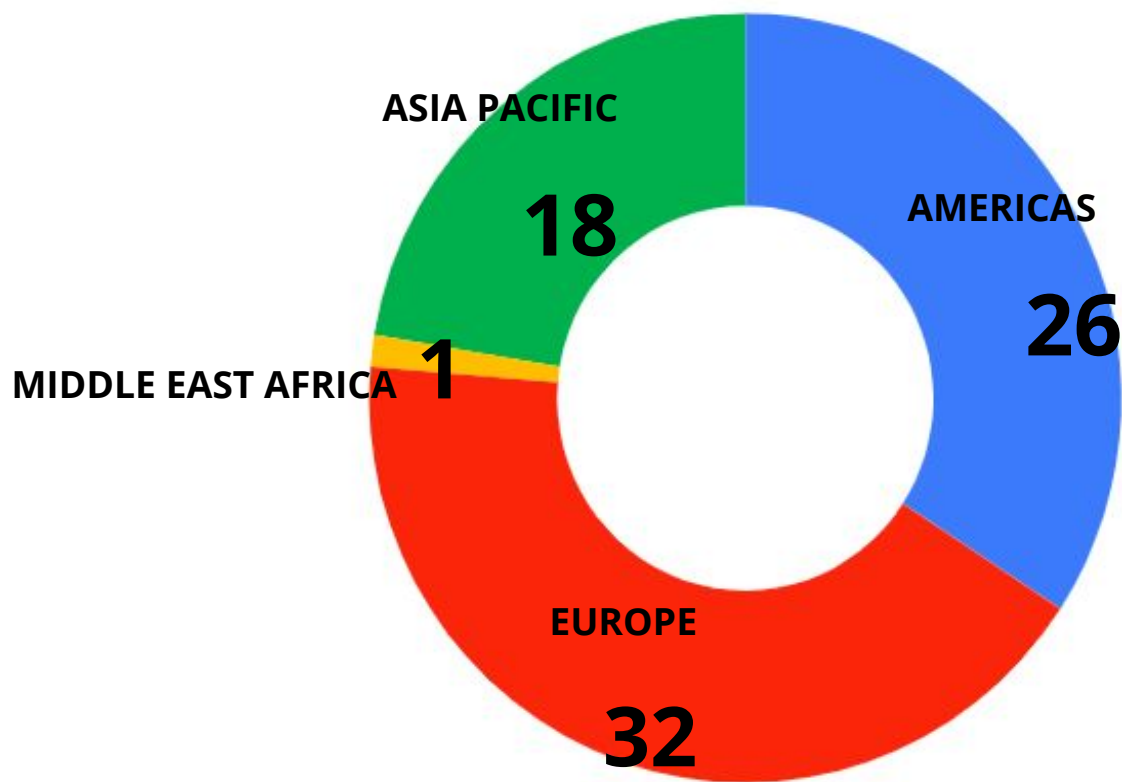
Andrej Romanov
User Support Specialist

ORCID

orcid.org/team
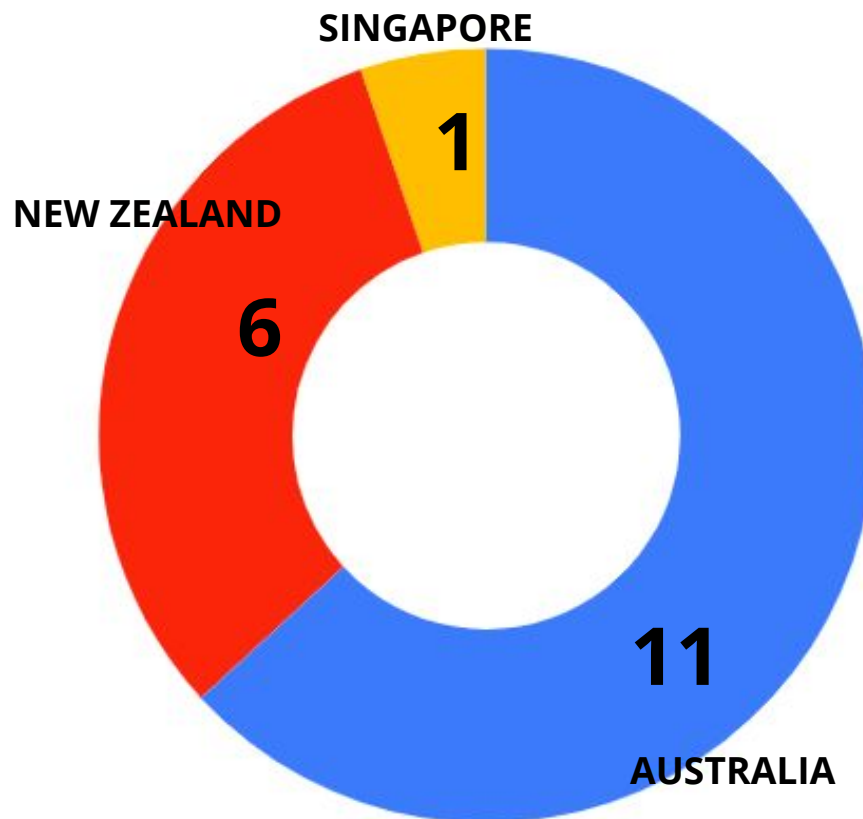
37 people
16 countries
15 languages

ELEMENTS & ORCID

77 INTEGRATIONS WORLDWIDE

ELEMENTS & ORCID IN ASIA PACIFIC

SINGAPORE

1

NEW ZEALAND

6

11

AUSTRALIA

18 INTEGRATIONS

iD

NEW DATA ON INTERACTIONS TO AND FROM ORCID

ORCID plans to develop an improved data reporting interface to members later this year (late 2020)

once Elements systems utilise the new /activities-update

capability these details will be included in a dashboard interface

ORCID and Symplectic Elements

Julia Hawks
**Senior VP Strategy and Business Development**

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Agenda

- Some background to Elements and our ORCID integration

- What's new with our ORCID integration?

- User perspective

- Admin perspective

- Reports and Dashboards

Symplectic Elements

Elements acts as an authoritative institutional data source, dedicated to supporting the capture, linking, and re-use of research information

- Creates "profiles" for each academic and staff member

- Profiles automatically populated and updated by multiple integrations

- Users can login to curate their profile including adding more information, marking things as private or favourites, and downloading CVs and reports.
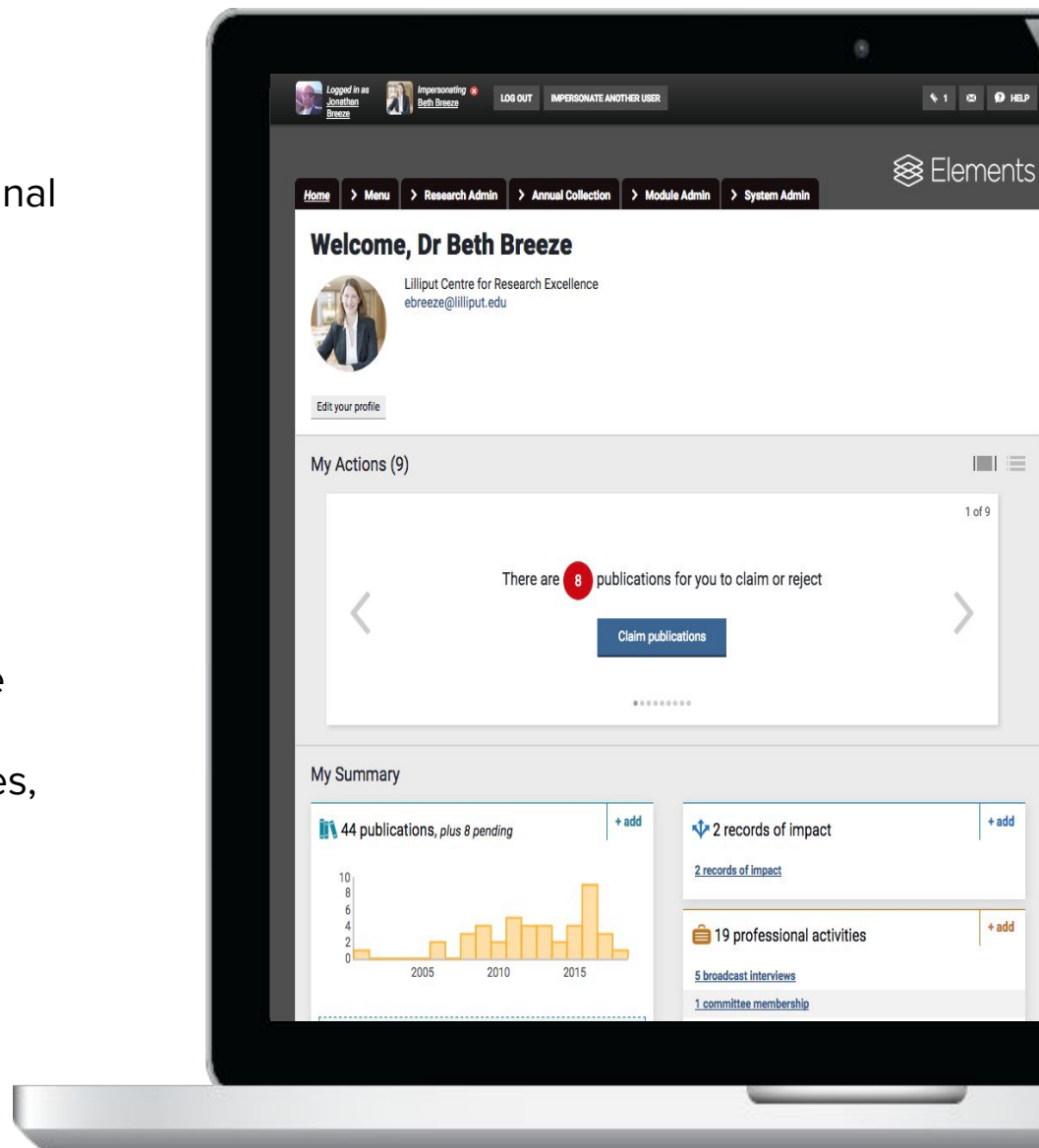
1. Automatic harvest of Publication IDs from ORCID

Our original "ORCID integration" allows users to authenticate their ORCIDs within Elements.

Elements then regularly searches ORCID for any persistent identifiers (PIDs) found in user's ORCID records and uses the returned PIDs to fetch publications from Elements data sources.

This allows Elements to create an active link with the source, obtain richer metadata about each publication including supplementary metadata such as citation counts.

1

PID

2

Data Sources

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DIGITAL science
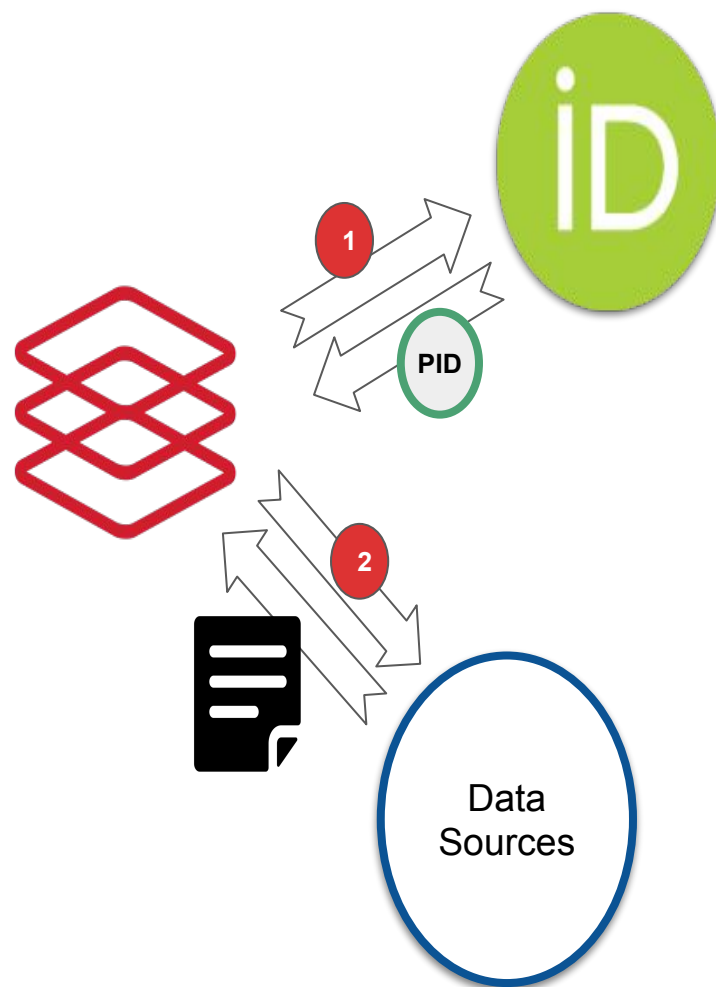
2. Using ORCID IDs in Elements' 'auto-claiming'

Elements also uses ORCID IDs for their intended purpose, to help uniquely identify researchers and contributors in records across the research ecosystem.

Elements mines the metadata included with publications from data sources to find unique ids including ORCID IDs.

IDs are offered to the researcher and, once claimed, used to search for more publications and also (optionally) to auto-claim them, saving the researcher time and effort.

Once they have claimed an ORCID researchers can also choose to authenticate it.

Data Sources

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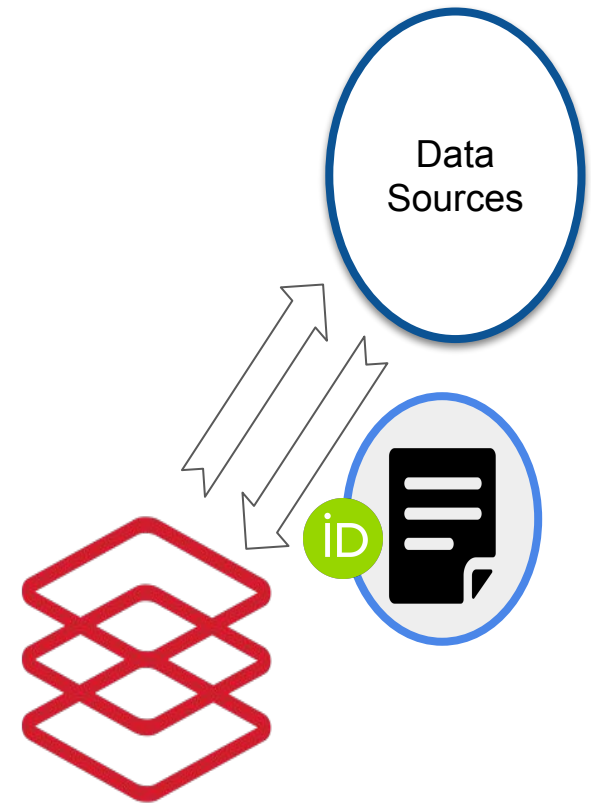
Display of ORCIDs

Once 'claimed' an individual's ORCID will display on their

- Elements Profile page (internal view only)

- Discovery Module page (public-facing profile from Elements)

🏛 Lilliput University

← BACK TO MY SEARCH

ABOUT   SCHOLARLY WORKS   RESEARCH   CONTRIBUTION   TEACHING AND SUPERVISION

Dr
Beth Breeze

ⓘ 0000-0001-7832-9314

🏛 **Director**
Lilliput Centre for Research Excellence

🏛 **Director**
Lilliput Global Challenges Doctoral Centre

📍 Centre for Philanthropy, University of Kent

🎞 Media

⚡ Collaboration Network

BIO

Beth Breeze is Director of the Global Challenges Doctoral Centre, based in the Graduate School, which is dedicated to doctoral research addressing the challenges of economic development and well-being faced by developing countries on the Organisation for Economic Co-operation and Development (OECD) list. Beth Breeze is also Director of the Centre for Philanthropy, which she co-founded in 2008. Beth began her career as a fundraiser for a youth homelessness charity, and spent a decade working in a variety of fundraising, research and charity management roles, including as deputy director at the Institute for Philanthropy. Motivated by the lack of substantive research underpinning practice, Beth completed a PhD on contemporary philanthropy at Kent in 2011, and has been working here ever since. Beth has written and edited four books. Her latest book, The New Fundraisers: who organises charitable giving in contemporary society?(2017), won the AFP Skystone Research Partners book prize. She has also written a wide range of research reports including ten editions of the annual 'Coutts Million Pound Donors Report'. At Kent, in 2016, she launched a Masters degree programme in Philanthropic Studies. Taught by distance learning to meet the needs of busy professionals, it attracts c.30 students per year seeking higher level career development, as well as a pathway from practice into academia, with a number of MA graduates going on to win PhD funding. Beth has served as trustee for the Cardinal Hume Centre for young homeless people, as a commissioner on the Commission for the Donor Experience, as publications editor of Philanthropy UK, as a member of the President's advisory council at NCVO; as a member of the Advisory Group of the Charity Tax Commission; and is currently a member of the European Fundraising Association's certification committee.

LILLIPUT UNIVERSITY APPOINTMENTS

▪ **Director**
Lilliput Centre for Research Excellence   ◆ 1 Jan 1990 - present

▪ **Director**
Lilliput University, Lilliput Global Challenges Doctoral Centre, United Kingdom   ◆ 2019 - present

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What's new with our ORCID integration?

Automatically send publications to ORCID

From Elements v5.18 (Oct 2019), researchers can elect to send publication records from Elements to ORCID.

The new integration, allows researchers to automatically associate their publications already collected within Elements with their ORCID ID.

Send affiliation information

From v5.19 (Dec 2019), researchers can choose to send an affiliation assertion from Elements to their ORCID Profile.

Elements will send either an 'Employment' or an 'Education' affiliation to ORCID depending on whether or not the new 'is student' flag is set in the user's Elements account.
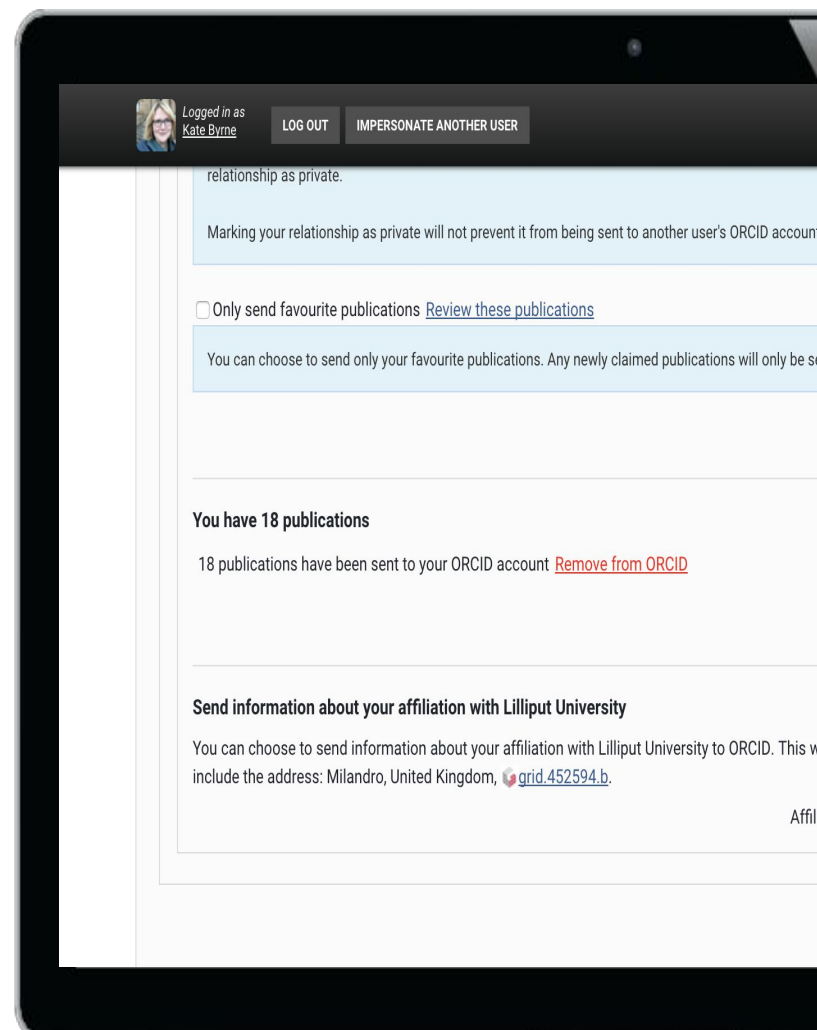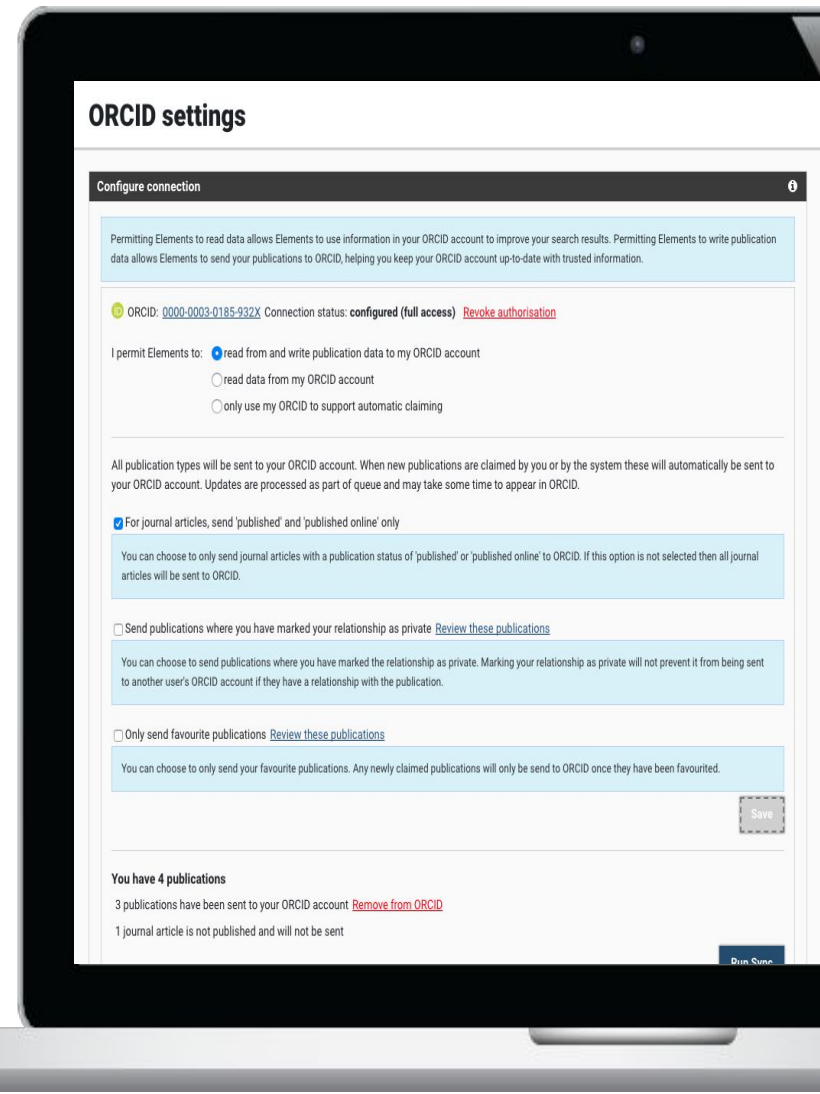
Send publications to ORCID

Our new '**ORCID settings' page** allows users to control the write integration.
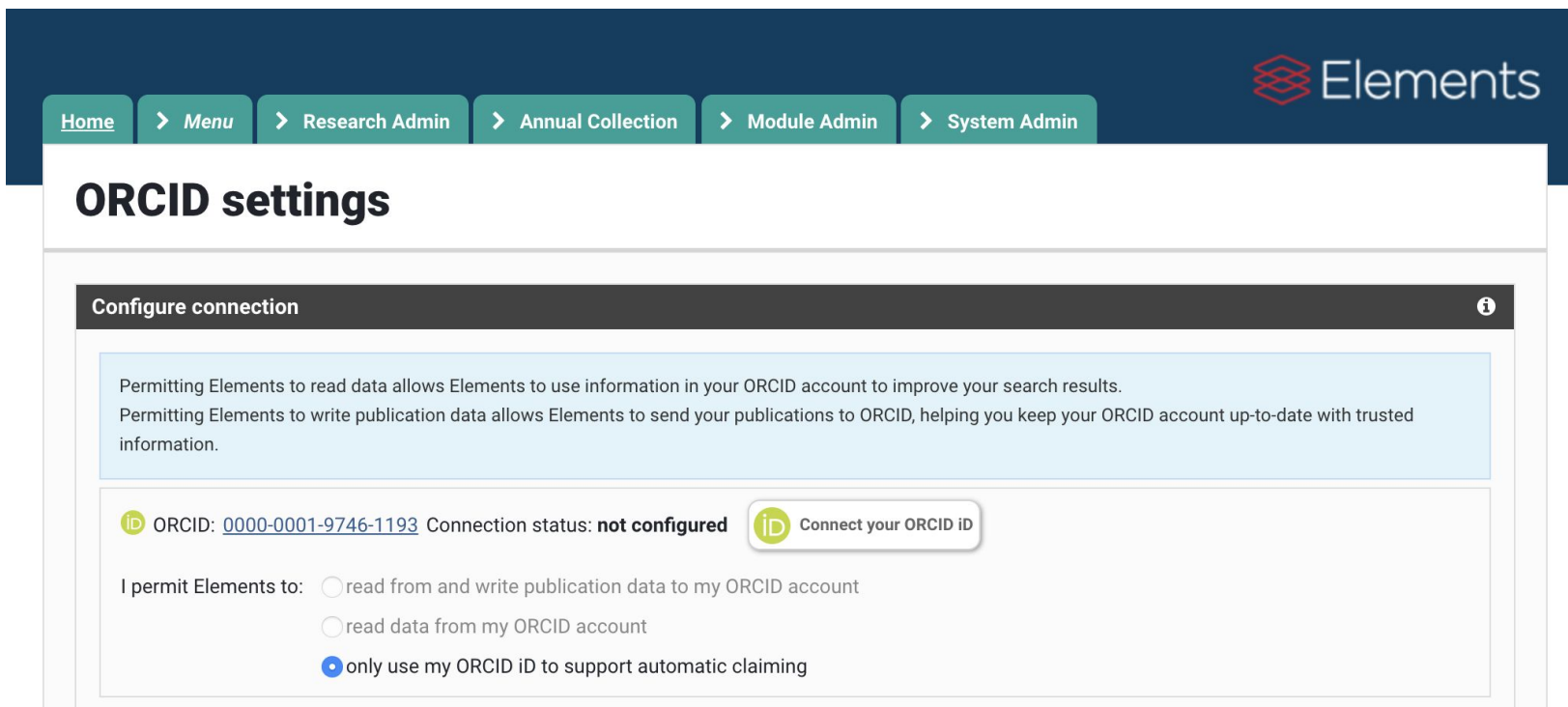
Researchers can use a number of different settings to control which (if any) publications are sent to ORCID.

Note: Enabling the write integration requires existing ORCID connections to be re-authenticated.

ORCID settings

Configure connection

Permitting Elements to read data allows Elements to use information in your ORCID account to improve your search results. Permitting Elements to write publication data allows Elements to send your publications to ORCID, helping you keep your ORCID account up-to-date with trusted information.

ORCID: 0000-0003-0185-932X Connection status: **configured (full access)** Revoke authorisation

I permit Elements to: ● read from and write publication data to my ORCID account
○ read data from my ORCID account
○ only use my ORCID to support automatic claiming

All publication types will be sent to your ORCID account. When new publications are claimed by you or by the system these will automatically be sent to your ORCID account. Updates are processed as part of queue and may take some time to appear in ORCID.

☑ For journal articles, send 'published' and 'published online' only

You can choose to only send journal articles with a publication status of 'published' or 'published online' to ORCID. If this option is not selected then all journal articles will be sent to ORCID.

☐ Send publications where you have marked your relationship as private Review these publications

You can choose to send publications where you have marked the relationship as private. Marking your relationship as private will not prevent it from being sent to another user's ORCID account if they have a relationship with the publication.

☐ Only send favourite publications Review these publications

You can choose to only send your favourite publications. Any newly claimed publications will only be send to ORCID once they have been favourited.

Save

You have 4 publications

3 publications have been sent to your ORCID account Remove from ORCID

1 journal article is not published and will not be sent

Run Sync

Quick steps for users to enable

Step 1: Connect your ORCID with Elements and grant permission

Quick steps for users to enable

Step 2: Change any default settings and Save

Manage which publications will be sent

All publication types will be sent to your ORCID account. When new publications are claimed by you or by Elements these will automatically be sent to your ORCID account. Updates are processed as part of queue and may take some time to appear in ORCID.

☑ For journal articles, send 'published' and 'published online' only

> You can choose to send only journal articles with a publication status of 'published' or 'published online' to ORCID. If this option is not selected then all journal articles will be sent to ORCID.

☐ Send publications where you have marked your relationship as private Review these publications

> By default, publications where you have marked your relationship as private will not be sent. You can choose to send publications where you have marked your relationship as private.
>
> Marking your relationship as private will not prevent it from being sent to another user's ORCID account if they have a relationship with the publication.

☑ Only send favourite publications Review these publications

> You can choose to send only your favourite publications. Any newly claimed publications will only be sent to ORCID once they have been favourited. If non-favourite publications have already been sent to ORCID by Elements, these will be removed.

Save

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Quick steps for users to enable

Step 3: Publications will now automatically be added and updated in ORCID!

You have 5 publications

4 publications have been sent to your ORCID account Remove from ORCID

4 publications are marked as favourite

Users can view a count of publications sent

Demo ORCID

ORCID iD
https://sandbox.orcid.org/0000-0003-3206-4888

🖨 Print view ❓

Employment (1)   ⇅ Sort

Lilliput University: Milandro, GB
Employment

Source: Symplectic Elements - Discovery Demo   ★ Preferred source

Works (5 of 5)   ⇅ Sort

Test Book
2020-02-11 | book
SOURCE-WORK-ID: 726721

Source: Symplectic Elements - Discovery Demo   ★ Preferred source

Test Dataset
2020-02-11 | data-set
SOURCE-WORK-ID: 726722

Source: Symplectic Elements - Discovery Demo   ★ Preferred source

And of course view their publications in ORCID

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Users can:

- Decide which ORCID integrations they use

- Change their mind at any time

- Control which publications are sent which can include only sending "favourites"

- Can delete any publications previously sent to ORCID

ORCID settings

Configure connection ⓘ

Permitting Elements to read data allows Elements to use information in your ORCID account to improve your search results. Permitting Elements to write publication data allows Elements to send your publications to ORCID, helping you keep your ORCID account up-to-date with trusted information.

ⓘD ORCID: 0000-0003-0185-932X Connection status: **configured (full access)** Revoke authorisation

I permit Elements to: ● read from and write publication data to my ORCID account

○ read data from my ORCID account

○ only use my ORCID to support automatic claiming

All publication types will be sent to your ORCID account. When new publications are claimed by you or by the system these will automatically be sent to your ORCID account. Updates are processed as part of queue and may take some time to appear in ORCID.

☑ For journal articles, send 'published' and 'published online' only

You can choose to only send journal articles with a publication status of 'published' or 'published online' to ORCID. If this option is not selected then all journal articles will be sent to ORCID.

☐ Send publications where you have marked your relationship as private Review these publications

You can choose to send publications where you have marked the relationship as private. Marking your relationship as private will not prevent it from being sent to another user's ORCID account if they have a relationship with the publication.
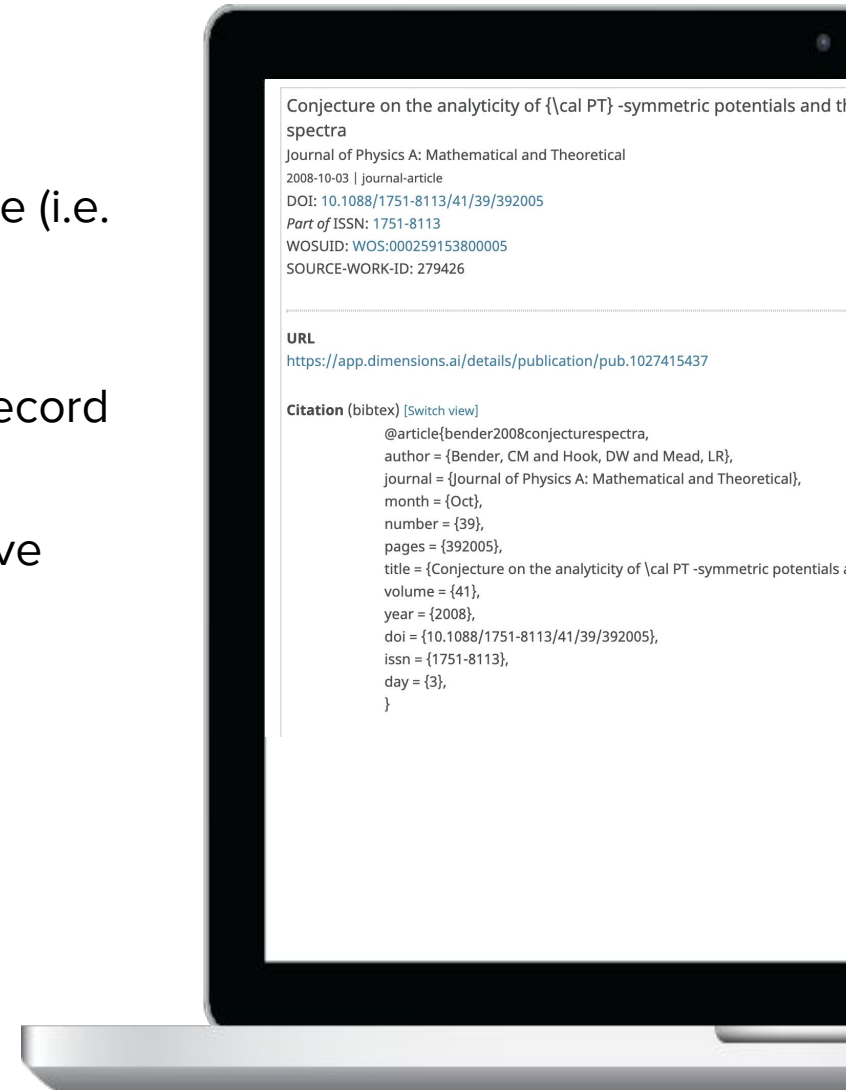
☐ Only send favourite publications Review these publications

You can choose to only send your favourite publications. Any newly claimed publications will only be send to ORCID once they have been favourited.
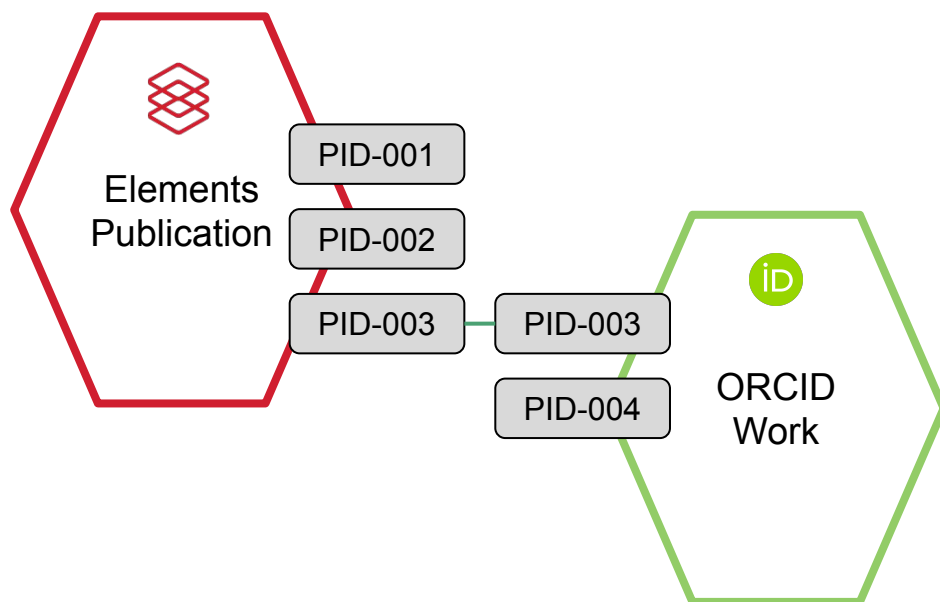
Save

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Some (more) details...

- Publication push managed as part of a queue (i.e. not instant)

- Highest precedent record metadata sent (including BibTex reference). User preferred record takes precedent if present.

- Users will have visibility that publications have been sent to ORCID

Conjecture on the analyticity of {\cal PT} -symmetric potentials and tł spectra
Journal of Physics A: Mathematical and Theoretical
2008-10-03 | journal-article
DOI: 10.1088/1751-8113/41/39/392005
Part of ISSN: 1751-8113
WOSUID: WOS:000259153800005
SOURCE-WORK-ID: 279426

URL
https://app.dimensions.ai/details/publication/pub.1027415437

Citation (bibtex) [Switch view]
```
@article{bender2008conjecturespectra,
    author = {Bender, CM and Hook, DW and Mead, LR},
    journal = {Journal of Physics A: Mathematical and Theoretical},
    month = {Oct},
    number = {39},
    pages = {392005},
    title = {Conjecture on the analyticity of \cal PT -symmetric potentials a
    volume = {41},
    year = {2008},
    doi = {10.1088/1751-8113/41/39/392005},
    issn = {1751-8113},
    day = {3},
}
```

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Matching to records already within ORCID

- Persistent identifiers used to match publications within ORCID

- If persistent identifiers are absent, or not matching, the publications will not match and duplicates may exist

- To deal with duplicates users can curate their record within ORCID or within Elements

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From an Admin perspective

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From an Admin perspective

System Administrators can:
- Enable the new Write integration and the affiliation assertion separately on behalf of the institution. Organisations can continue to use just the existing integration if they wish.

- Enable verified only records

- Configure mappings between Elements Publication types and ORCID Work types.

Manage publication data source: ORCID

< Return to Manage data sources

Current synchronisation activity

This source is currently enabled. Please note that there will be some delay in stopping synchronisation actions when you disable this data source.

Current activity: There is currently no work to do.

Recent average response time: No interactions in the last 15 minutes
View user search queue

Activity log

Settings

Enabled: ✓

Write integration enabled: ✓

Only allow verified records to be sent to ORCID: ☐

Affiliation assertion enabled: ✓

How does data enter this system from ORCID?
- Online searches are periodically performed in the background via a user search queue.

How is ORCID data assigned to users of the system?
- Search results from background online searches are offered to users.

Cancel   Update

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Configuring Type Mappings

- Default Elements types are already mapped to the corresponding ORCID Work type 'out of the box'

- System Administrators can configure the type mapping, allowing Elements to also push custom publication types.

- As Elements supports a wider range of type than ORCID does, a number of Elements publication types will need to map to the 'other' ORCID category

Elements identifier		ORCID work type	ORCID category
artefact		other	Other
book		book	Publications
chapter		book-chapter	Publications
composition		other	Other
conference		conference-paper	Conference
dataset		data-set	Other
design		other	Other
exhibition		other	Other
figure		other	Other
fileset		other	Other
internet-publication		other	Other
journal-article		journal-article	Publications
media		other	Other
other		other	Other
patent		patent	Intellectual Property
performance		artistic-performance	Other
presentation		lecture-speech	Other
poster		conference-poster	Conference
report		report	Publications
scholarly-edition		other	Other
software		software	Other
thesis-dissertation		dissertation	Publications

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Steps for Administrations

1. Optional step: test features by connecting your Elements Test/Dev environment with ORCID Sandbox

2. Communicate with your researchers on the options available

3. Update Data source management page settings for ORCID write and affiliation

4. Complete the type mapping CSV and upload your file

5. Update Global Settings with your institution's GRID ID if you wish to send Affiliation data. Visit https://www.grid.ac/ if you need to find out your institution's GRID

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Reports for administrators

New Dashboard:
User Identifiers by
Scheme

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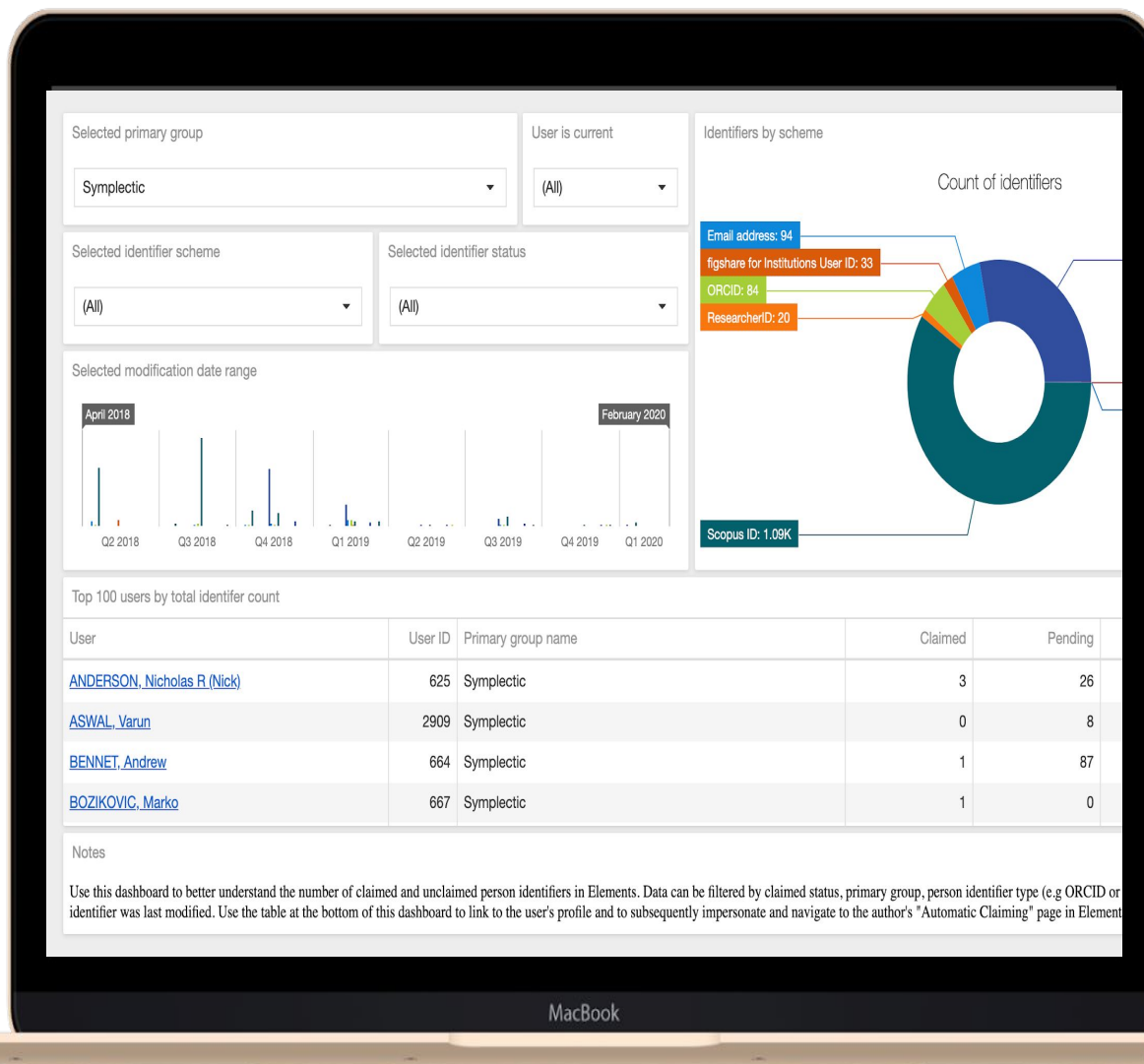
Reports for administrators

Basic Report (CSV)
Associated ORCID IDs

- View who has 'claimed' their ORCID

- View who has 'connected' their ORCID

Support Articles (for current clients)

https://support.symplectic.co.uk/support/solutions/articles/6000227965-enabling-the-orcid-write-integration

https://support.symplectic.co.uk/support/solutions/articles/6000230238-enabling-the-orcid-write-integration-to-send-information-on-user-affiliation

https://support.symplectic.co.uk/support/solutions/articles/6000050013-how-to-enable-elements-to-search-orcid

Release notes 5.18
https://support.symplectic.co.uk/support/solutions/articles/6000228168-symplectic-elements-v5-18-release-notes

Release notes 5.19
https://support.symplectic.co.uk/support/solutions/articles/6000230234-symplectic-elements-v5-19-release-notes

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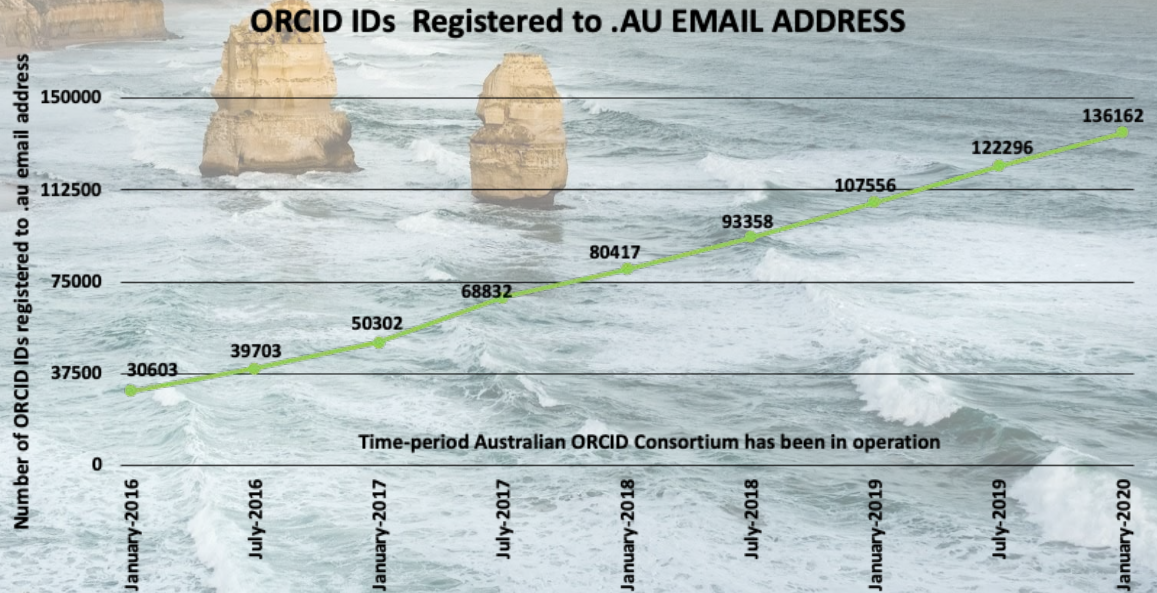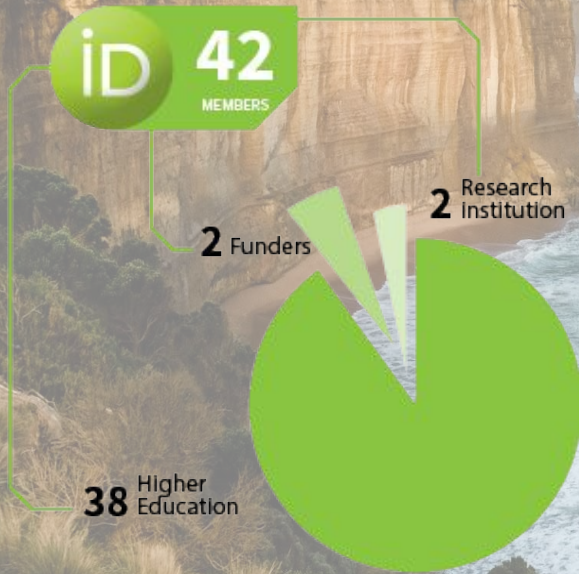# SYMPLECTIC ELEMENTS WITHIN AUSTRALIAN ORCID CONSORTIUM

Melroy Almeida
Australian Access Federation
https://orcid.org/0000-0003-3522-7849

AUSTRALIAN ORCID CONSORTIUM LEAD

AUSTRALIAN ORCID CONSORTIUM

iD **42** MEMBERS

2 Research Institution

2 Funders

38 Higher Education

ORCID IDs Registered to .AU EMAIL ADDRESS

Number of ORCID IDs registered to .au email address

150000

112500

75000

37500

0

30603
39703
50302
68832
80417
93358
107556
122296
136162

Time-period Australian ORCID Consortium has been in operation

January-2016
July-2016
January-2017
July-2017
January-2018
July-2018
January-2019
July-2019
January-2020

INTEGRATION SNAPSHOT

7
MEMBERS COMPLETED MORE THAN 1 INTEGRATION

34
MEMBERS INTEGRATED

42
MEMBER INTEGRATIONS

INTEGRATION TYPE

Custom integration, 15

Symplectic Elements, 11

Other vendor integration , 16

POTENTIAL USE-CASES

- Accurate <metadata>

- Curated ORCID record

- Automatic pre-population of grant application

Thank You for Your Support!

Please use the webinar chat box to ask questions or share comments

Contact Information

- Julia Hawks, **Symplectic Elements**, Vice Preseident, Strategy & Businesss Development. julia.hawks@symplectic.co.uk

- **Leonie Hayes, Symplectic Elements**, Client Support Manager, Asia Pacific, leonie@symplectic.co.uk

- **Brian Minihan, ORCID APAC Engagement** Oceania, Hong Kong, Thailand, South Asia: b.minihan@orcid.org

- **Melroy Alemeida, Technical Support Analyst, Australian Access Federation,** melroy.almeida@aaf.edu.au

Thank you!

Brian Minihan
Engagement Lead, Oceania & Hong Kong
b.minihan@orcid.org
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