

ORCID Product Interest Group

Monday, September 14



Connecting Research
and Researchers



@ORCID_Org

Welcome

- Hello!
 - Product Interest Group Scope
 - Meeting format and timing
-
- This meeting - What are we working on
 - Next meeting - What's to come in 2021

Agenda

- Welcome
- General Product Update
- Project Updates
- Answering your questions
- Interactive feedback session
- Wrap Up

Introductions - Who we are...



**Tom
Demeranville**

Product Director



**Paula
Demain**

Product Manager



**Liz
Krzmarich**

Tech Lead,
New Projects



**Rob
Blackburn**

Web Producer



**Dan
Dineen**

UX Designer

General Product Update

What we have delivered so far:

- Service Provider Certification Program
- New Homepage
- Improvements to password and iD recovery
- Improvements to Search in UI and API
- AMR to id_token
- Numerous bug fixes



General Product Update

What's still to come!

- Addition of CRediT Contributor Roles
- Linking works and funding by new 'funded by' relationship type
- Ability for members to update and delete items where they are the source even though access has been revoked

- Add ROR to the list of organisation IDs that we support
- Implement ROR Data Loader
- Add ROR IDs to User Interface
- Add ROR IDs to search and API Responses
- Track adoption
- Duplicate ORG IDs

Member Portal

New suite of tools to help organizations make the most of their ORCID membership

Planned features will allow members to:

- Add/update data on researchers' ORCID records
- Manage your organization's ORCID membership information & API credentials
- Access data and reports

Member Portal

ORCID Member Portal BETA

This site is for administrators of ORCID member organizations and is separate from the ORCID registry. Go to the ORCID Registry to **sign into your ORCID record**

Username

Password

☒ Remember me

Sign in

Did you forget your password?

ORCID © 2020 ORCID, Inc [Privacy Policy](#) [Terms of Use](#) [ORCID Registry](#)



When will the Member Portal be available?

- Initial features available for testing by select consortium members Q3 2020
- Phased roll-out to additional members Q4 2020
- Additional features to be added throughout 2020-21

1. Create a CSV file with affiliation info for your researchers

A	B	C	D	E	F	G	H	I	J	K	L	M
email	affiliation-section	department-name	role-title	start-date	end-date	org-name	org-country	org-city	org-region	disambiguated-organization-identifier	disambiguation-source	url
researcher01@mailinator.com	employment	Psychology	Associate Professor	2014-04		University of Wisconsin-Madison	US	Madison	WI	5228	RINGGOLD	https://wisc.edu
researcher02@mailinator.com	employment	Biology	Assistant Professor	2015-08	2018-07	University of Wisconsin-Madison	US	Madison	WI	5228	RINGGOLD	https://wisc.edu
researcher03@mailinator.com	employment	Water Chemistry	Lab Manager	2014-04		University of Wisconsin-Madison	US	Madison	WI	5228	RINGGOLD	https://wisc.edu
researcher04@mailinator.com	employment	Biology	Professor	1996-08	2022-07	University of Wisconsin-Madison	US	Madison	WI	5228	RINGGOLD	https://wisc.edu

Required fields	<ul style="list-style-type: none"> • Researcher email • ORCID affiliation section (employment, education, etc) • Organization name, country, city • Organization identifier (GRID, Fundref or Ringgold)
Optional fields	<ul style="list-style-type: none"> • Department • Role/title • Start/end dates • URL

2. Upload CSV to member portal

ORCID Member Portal BETA | ORCID, Inc

Member Tools Liz Krznarich

Affiliations

+ Add affiliation Import affiliations from CSV Generate report Download permission links

Import affiliations

Please select a CSV file to upload

File path

Choose File affiliations.csv

Cancel Upload

*Or enter affiliations 1 at a time by clicking **Add affiliation***



3. Download permission links

Affiliations

+ Add affiliation

Import affiliations from CSV

Generate report

Download permission links

User Email ▾	ORCID ID ⇅	Affiliation Data ⇅	Status ⇅
researcher01@mailinator.com		EMPLOYMENT University of Wisconsin-Madison: Madison, WI, US Psychology (Associate Professor) 2014-04 View Details	Pending Edit Delete
researcher02@mailinator.com		EMPLOYMENT University of Wisconsin-Madison: Madison, WI, US <i>Biology (Assistant Professor)</i>	Pending Edit Delete

A	B
email	link
researcher01@mailinator.com	https://member-services.sandbox.orcid.org/landing-page?state=pmYS1QUkCn2MpZxOr2jI4rff7N8TCAU4sXFvyS2CNM
researcher02@mailinator.com	https://member-services.sandbox.orcid.org/landing-page?state=XdMpqtMCKTZWE2mJLvczc4ZNOaOCaEBYXMS3a0u1gbc
researcher03@mailinator.com	https://member-services.sandbox.orcid.org/landing-page?state=SfdZhwHTEKtUjzOaHYdIE9y_FAVFEIkJ_s-gaJfm3AA
researcher04@mailinator.com	https://member-services.sandbox.orcid.org/landing-page?state=AIU735HCUg3CgXBk-ZB58SxDURHzHhJrMU6S2vf_j7k



4. Email links to researchers

Subject: Connect your ORCID iD to Test University

To: researcher01@mailinator.com

Reply-to: orcid@testu.edu



Test University

Dear Dr. Professor,

As part of its ongoing ORCID initiative Test University would like to add affiliation information to your ORCID record.

Your permission is needed in order to allow us to update your ORCID record. To grant permission, simply click the link below, which will prompt you to either link your existing ORCID account or (if you don't yet have an ORCID iD) register a new one.

[Grant Test University permission to edit my ORCID record](#)

After granting permission, an employment entry will be added to your ORCID record. The source of this entry in ORCID will be Test University via ORCID Member Services.

Why should I allow Test University to update my ORCID record?

Link value = URL for this researcher downloaded from Member Portal, ex:

<https://member-services.sandbox.orcid.org/linking-page?state=pmYS1QUkCn2MpZxOr2jJI4rff7N8TCAU4sXFvyS2CNM>

5. Researcher signs into ORCID & grants permission

The image shows the ORCID sign-in interface. The main page has the ORCID logo at the top, followed by the text "Sign into ORCID or [Register now](#)". Below this are two tabs: "Personal account" (selected) and "Institutional account". The "Sign in with your ORCID account" section contains input fields for "Email or ORCID iD" and "ORCID password", a "Sign into ORCID" button, and a link for "Forgot your password or ORCID ID?". At the bottom, there are social media login options: "Sign in with Google" and "Sign in with Facebook".

An authorization overlay is displayed on the right side of the screen. It features the ORCID logo and the text "Test Account" with the URL "https://sandbox.orcid.org/0000-0002-1223-3173". Below this, it says "(Not You) ?". The overlay title is "Test University ?" and it states "has asked for the following access to your ORCID Record". It lists two permissions: "Add/update your research activities (works, affiliations, etc)" and "Get your ORCID iD". A disclaimer follows: "This application will not be able to see your ORCID password or any other information in your ORCID record with visibility set to Only me. You can manage permission granted to this and other Trusted Organizations in your [account settings](#)." At the bottom of the overlay are two buttons: "Authorize" and "Deny".

No ORCID iD? No problem! Researchers can register for an iD at this time



6. Researcher redirected to Member Portal

Researcher clicked “Authorize”: Success message

Thanks, Test User

You have successfully granted Test University permission to update your ORCID record, and your record will be updated with affiliation information shortly.

 <https://sandbox.orcid.org/0000-0001-5667-4176>

If you find that data added to your ORCID record is incorrect, please contact Test University

Researcher clicked “Deny”: Error message

**Oops, you have denied access.
Test University
will not be able to update your ORCID record.**

If this was a mistake, click the button below to grant access.

Allow Test University to update my ORCID record

7. ORCID record updated

▼ Employment (1)

↕ Sort

University of Wisconsin-Madison: Madison, WI, US

2014-04 to present | Associate Professor (Psychology)

Employment

Source: Test University via ORCID Member Services - Sandbox

★ Preferred source

Due to the technical workflow used to transfer permission behind the scenes, source is displayed as
Your organization name via ORCID Member Services

Researcher ORCID iD and status “In ORCID” shown in Member Portal

researcher01@mailinator.com	https://sandbox.orcid.org/0000-0001-5667-4176	EMPLOYMENT	In ORCID	Edit Delete
		University of Wisconsin-Madison: Madison, WI, US		
		Psychology (Associate Professor)		
		2014-04		
		View Details		



Member Reporting

The member portal will host new and improved reporting for members.

The portal will provide insight into how your integrations are performing, the number of iDs they've connected to, the number of records updated, user geography and more.

As well as new features, we've incorporate the most used features of our old reporting, e.g. email domain stats.



What's in the reports?

Impact overview: the number of researchers interacting with your integrations

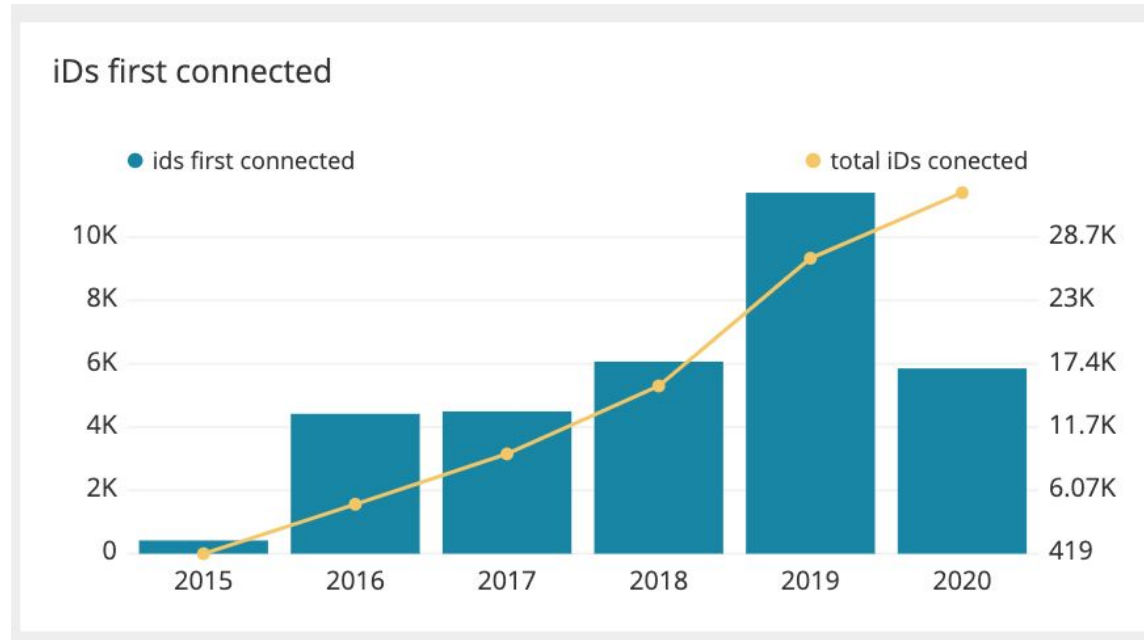
Records updated: the updates your integrations have performed.

Email domain: how many ORCID records are connected to your email domain(s)

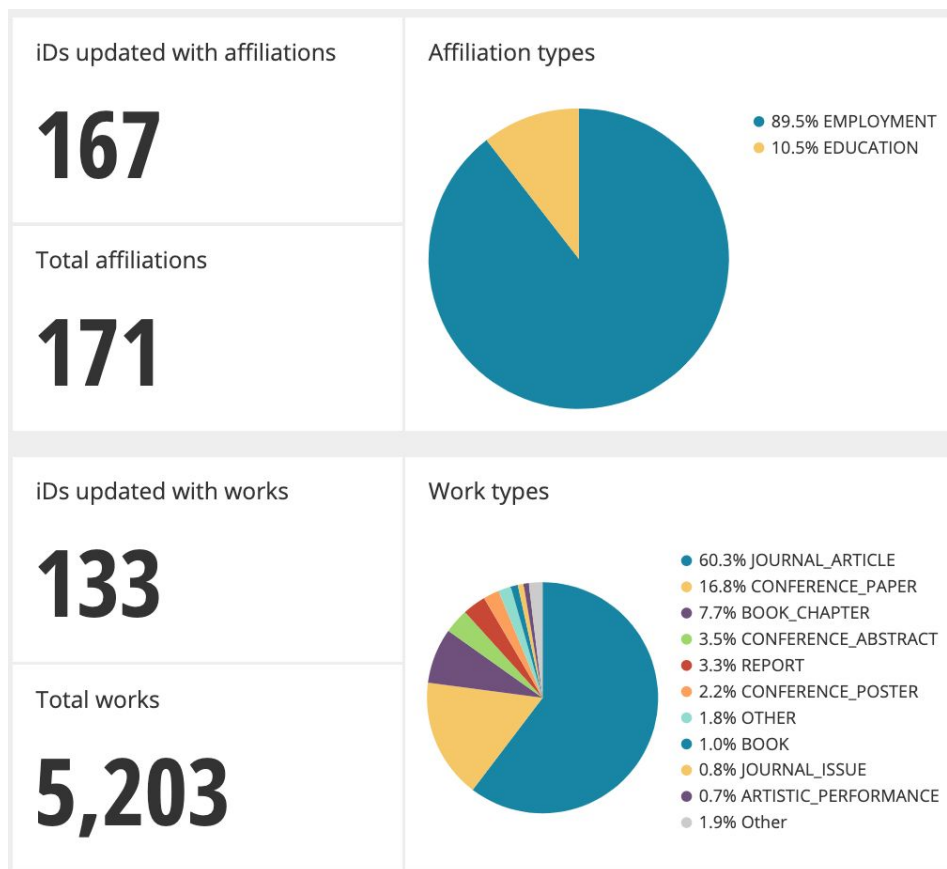
Web usage: the quantity of authentications your integrations are processing

Geography of connected iDs: where the connected iDs originate and which organizations they're affiliated with

Time series data



Up to date information



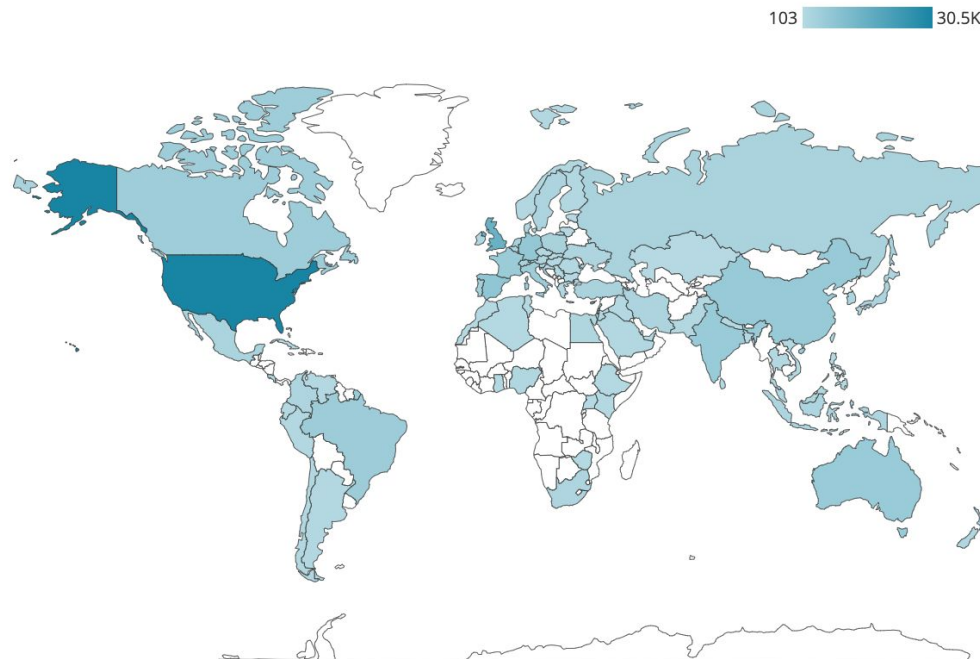
Interactive dashboards

Geography of connected iDs

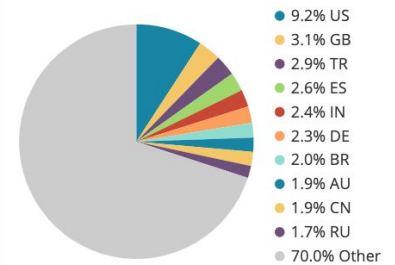
This section shows where the connected iDs originate.

Results with less than 100 researchers are omitted

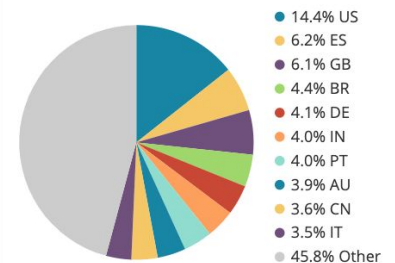
Affiliation countries (connected iDs)



User location (last 12 months)

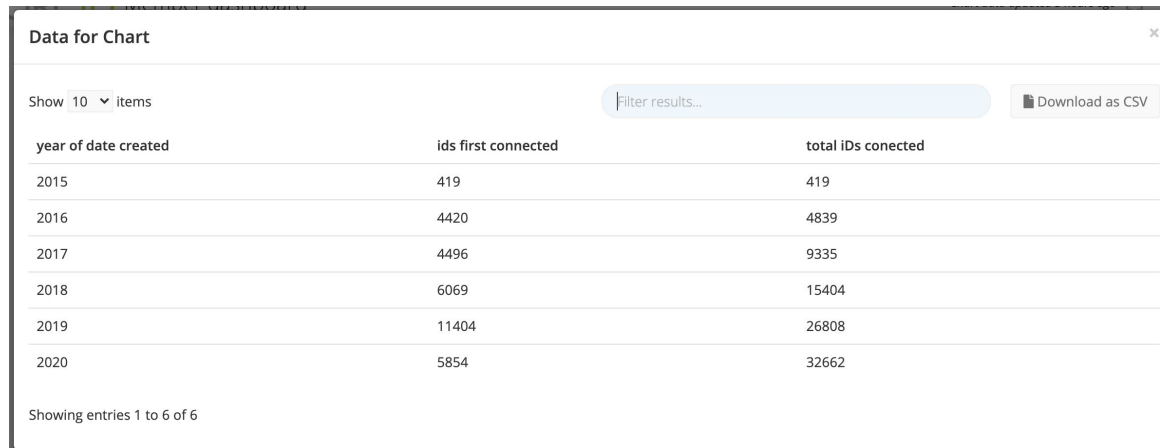


Country code (connected iDs)



CSV downloads

All data will be available as CSV downloads, so you can analyse them in other applications, and repurpose them for presentation



Data for Chart

Show 10 items [Download as CSV](#)

year of date created	ids first connected	total iDs conected
2015	419	419
2016	4420	4839
2017	4496	9335
2018	6069	15404
2019	11404	26808
2020	5854	32662

Showing entries 1 to 6 of 6

Website Refresh

- Migration from Drupal to WordPress
- Aims:
 - To improve discoverability of content
 - To improve accessibility
 - To improve overall UX
 - Improve ease of use for staff
 - Improve promotion of events and community with better multimedia support

You are here: [Home](#) / Documentation

Documentation

ORCID disambiguates researchers, and connects people with their research activities. This includes employment affiliations, research outputs, funding, peer review activity, research resources, society membership, distinctions and other scholarly infrastructure.

Connections are made by using our API within your existing workflows

ORCID serves as an information hub, enabling your authors and reviewers to reliably connect to their contributions, and to share information from their ORCID record as they interact with your system.





By using ORCID in your systems, you can uniquely identify the people you work with and discover information about them. You can also play your part in building a trusted research infrastructure by asserting connections between researchers and their activities. You simply ask them for permission, and then update their records with the information you hold.

Next steps:






- [Learn more about our features](#)
- [Learn more about our workflows](#)
- [Learn more about how to build and launch an integration](#)

 English ▼

DOCUMENTATION

-  Integration Guide +
-  Workflows +
-  API Tutorials +
-  Features +
- ? Integration and API FAQ

GITHUB DOCUMENTATION

-  API Tech Docs
-  Tech Tutorials
-  Content Negotiation
-  Open ID Connect
-  V3.0 API Schemas

ORCID

provide consent to share, saves researchers time and hassle, reduces the risk of errors and, critically, enables researchers to get the credit they deserve for the important work they're doing.

More information

— How do I collect an authenticated ID?

You collect authenticated IDs when you ask a researcher to sign in with their ORCID iD. This process uses a technology called “OAuth” or “SSO” and should be built into your workflow.

See the API Tutorial '[Get an Authenticated ORCID iD](#)' for more details.

+ How do I request permission to update an ORCID record?

+ How do I add items to an ORCID record?

+ What should I communicate to my users?

+ Why should I collect authenticated ORCID iDs?

+ Why should I update ORCID records?

+ What information does a work item contain?

+ What contributor information should I include when adding works or funding items?

Technical documentation

A more detailed tutorial can be found [here](#).

ORCID site media demo

1 SEPTEMBER, 2020 BY [ROB BLACKBURN](#)

FILED UNDER: [NEWS](#)

The Search Is On for ORCID's New Executive Director

23 JUNE, 2020 BY [LINDA O'BRIEN](#)

Are you a visionary strategy a [...]

FILED UNDER: [NEWS](#)

What is up with ORCID and ROR?

25 MARCH, 2020 BY [LAURE HAAK](#)

There's been much buzz in the [...]

FILED UNDER: [NEWS](#)

LANGUAGE

 English ▼

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☐ I agree to allow ORCID to use my

email as described above

SUBSCRIBE!

Registry Speedup and Modernization

Bringing the ORCID registry bang up-to-date

Behind the scenes

- A more sustainable architecture
- Updated infrastructure
- A fast, modern framework
- Pay off technical debt

Front of house

- Update registry UI
- Improve accessibility
- Smooth key journeys
- Lay groundwork for further innovation

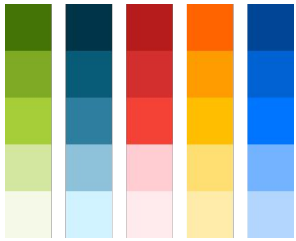
Registry Speedup and Modernization

Changes and updates coming online gradually.

- Evolution *not* revolution - It still *feels* like ORCID.
- Tackle long-standing UI bugbears and issues
- Improve the ORCID experience on smaller devices
- Accessible from the outset
- Bring coherence to the registry in look, feel and behaviour via a new design system

Registry Speedup and Modernization

ORCID design system & style guide



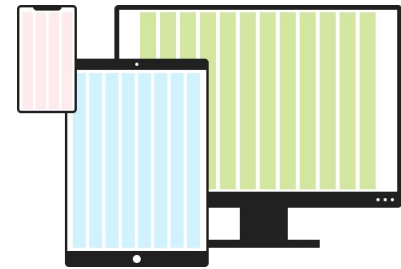
Colour palette

An accessible colour palette extending the current ORCID brand colours

ABC

Typography

Clear, legible typography with a consistent hierarchy



Layout & structure

A robust, flexible grid system that underpins layout on all device types



Distinguish yourself in three easy steps

ORCID provides a persistent digital identifier (an ORCID iD) that you own and control, and that distinguishes you from every other researcher. You can connect your iD with your professional information — affiliations, grants, publications, peer review, and more. You can use your iD to share your information with other systems, ensuring you get recognition for all your contributions, saving you time and hassle, and reducing the risk of errors.

[FIND OUT MORE ABOUT OUR MISSION AND VALUES](#)

1

REGISTER

Get your unique ORCID identifier. It's free and only takes a minute, so [register now!](#)

2

USE YOUR ORCID ID

Use your iD, when prompted, in systems and platforms from grant application to manuscript submission and beyond, to ensure you get credit for your contributions.

3

SHARE YOUR ORCID ID

The more information connected to your ORCID record, the more you'll benefit from sharing your iD - so give the organizations you trust permission to update your record as well as adding your affiliations, emails, other names you're known by, and more.

[? Help](#)

Sign in

Email or 16-digit ORCID ID


example@email.com or 0000-0001-2345-6789


SIGN IN


[Forgot your password or ORCID ID?](#)

Don't have an ORCID iD yet? [Register now](#)

or

 **Access through your institution**

 **Sign in with Google**

 **Sign in with Facebook**

- 1 Personal data
- 2 Security and notifications
- 3 Visibility and terms

Create your ORCID iD

This is step 1 of 3

Per ORCID's [terms of use](#), you may only register for an ORCID iD for yourself. Already have an ORCID iD? [Sign In](#)

First name i

Last name (Optional)

Primary email

Confirm primary email

Additional email (Optional) i

[+ Add another email](#)



Authorize access

You are currently signed in as:

Herman Cote

<https://qa.orcid.org/0000-0001-9618-9183>

[Sign out](#)

[Switch to another account](#) ▼

[Aalborg University Library](#) ?

has asked for the following access to your ORCID record:



Read your information with visibility set to Trusted Organizations



Add/update your research activities (works, affiliations, etc)



Add/update information about you (country, keywords, etc.)

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](#).

We recently updated our privacy policy. You can read the [summary of the changes and full policy here](#).

Forrest Gump

ORCID ID
<https://qa.orcid.org/0000-0002-5367-0804>

Notifications

<input type="checkbox"/>	Select all	<input type="checkbox"/> Archive selected	Hide archived (5)
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<div>Assert-o-matic </div> <div>has updated the Employment section of your record:</div> <div>New items added</div> <div>- ORCID UX Designer</div>			
<input type="checkbox"/>	ANNOUNCEMENT	ORCID and your data privacy	2019-07-08
<input type="checkbox"/>	PERMISSIONS	Crossref has asked for permission to make changes to your ORCID record	2019-07-08
<input type="checkbox"/>	PERMISSIONS	Crossref has asked for permission to make changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
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<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08

Showing 10 of 67

Show more notifications

We recently updated our privacy policy.
[You can read the changes and full policy here.](#)

Forrest Gump

ORCID ID
<https://qa.orcid.org/0000-0002-5367-0804>

Notifications

<input type="checkbox"/>	Select all	<input type="checkbox"/> Archive selected	Hide archived (5)
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	ANNOUNCEMENT	ORCID and your data privacy	2019-07-08
<input type="checkbox"/>	PERMISSIONS	Crossref has asked for permission to make changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08
<input type="checkbox"/>	YOUR RECORD	Assert-o-matic has made changes to your ORCID record	2019-07-08

Showing 10 of 67

Show more notifications



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



[https://orcid.org/
0000-0000-0000-0000](https://orcid.org/0000-0000-0000-0000)

Emails ▾

dan@karyx.co.uk
dand@gmail.com

Websites & Social Links ▾

[The main ORCID website](#)
[My Karyx company website](#)

Other IDs ▾

[Scopus Author ID: 12345678900](#)
[ResearcherID: G-1234-5678](#)

Keywords ▾

Designer, UX, UI, User experience

Countries ▾

United Kingdom

Published name

Daniel S Dineen ESQ

Name ▾

Daniel Scott Dineen

Other names ▾



Dan Dineen, Daniel S Dineen

Biography


Lorem ipsum dolor sit amet, consectetur adipiscing elit. Velit fames mattis massa nulla faucibus. Imperdiet ultrices id vulputate dui sem sit ut donec sed. Lectus cursus enim velit mauris porttitor quam sodales. Feugiat a sit eget elementum platea. Et velit enim urna, pharetra, leo.


[? Help](#)

You are currently managing an ORCID record  0000-0000-0000-0000 [Switch to another account](#)

 Printable version  Get a QR code for your ORCID ID  Display your ID on other sites



<https://orcid.org/0000-0000-0000-0000>
[Preview public record](#)







Emails 

dan@karyx.co.uk 
dand@gmail.com 

Websites & Social Links 

The main ORCID website 
My Karyx company website 

Keywords 

Designer 
design 
UX 
UI 
User experience 
service design 

Countries 

United Kingdom 
Australia 
United States of America 

Names

Published name
Daniel S Dineen ESQ

Name
Daniel Scott Dineen

Other names

Dan Dineen

Danny D

The D Man

The DSter

Dtronic

Daniel S Dineen



 Help

Accessibility Statement

A commitment to making ORCID accessible to everyone, regardless of technology or ability.

- Launched in August 2020
- An interim statement, *not* the final thing
- An acknowledgment that we can *and will* do more to make ORCID accessible to all
- *The real work starts now*

Accessibility Statement

Where do we go from here?

- Continue to 'bake' accessibility thinking into our processes and workflows
- Complete registry speedup & website migration projects
- Full accessibility audit in 2021
- Revise the accessibility statement

Accessibility Statement

How can you help?

- Review the statement and give us feedback
<https://orcid.org/content/orcid-accessibility-statement>
- Get in touch if you face challenges or barriers to using ORCID. We'd love to talk to you about your experience and how we could make it better.

A bit of interaction...

Visit **Menti.com** and enter
the code

28 54 39 8

Wrap up and next steps

- We'll publish a blog post summarizing the meeting
- Next meeting - December
 - Feedback on released features shown today
 - Preview of our 2021 work plan
- Special interest group proposals welcome
 - Wait, what? What's a special interest group?