Product Interest Group

Tuesday 28 September 2021

Agenda

WELCOME - Introduction, meet the team, 2021 objectives

UPDATES

NEXT UP

LOOKING FORWARD

Q&A

The Product team

Tom
Demeranville

Product Director

Paula
Demain

Product Manager

Dan
Dineen

UX Designer

Pip
White

Product Intern

In short...

Increase the number of connections between, people, places and things.

2021 Objectives

- Raise the proportion of active users who have populated their records or have had their record updated by a member
- Raise the proportion of members performing updates, or otherwise enjoying the benefits of their membership
- Raise the quality of the data we deliver to our community

Updates since last meeting

Updates

- Affiliation Manager
- Member Reporting
- Support for ROR
- Support for CRediT
- Linking Funding to Research Outputs
- Translations
- New UI for inbox and public record

Affiliation Manager

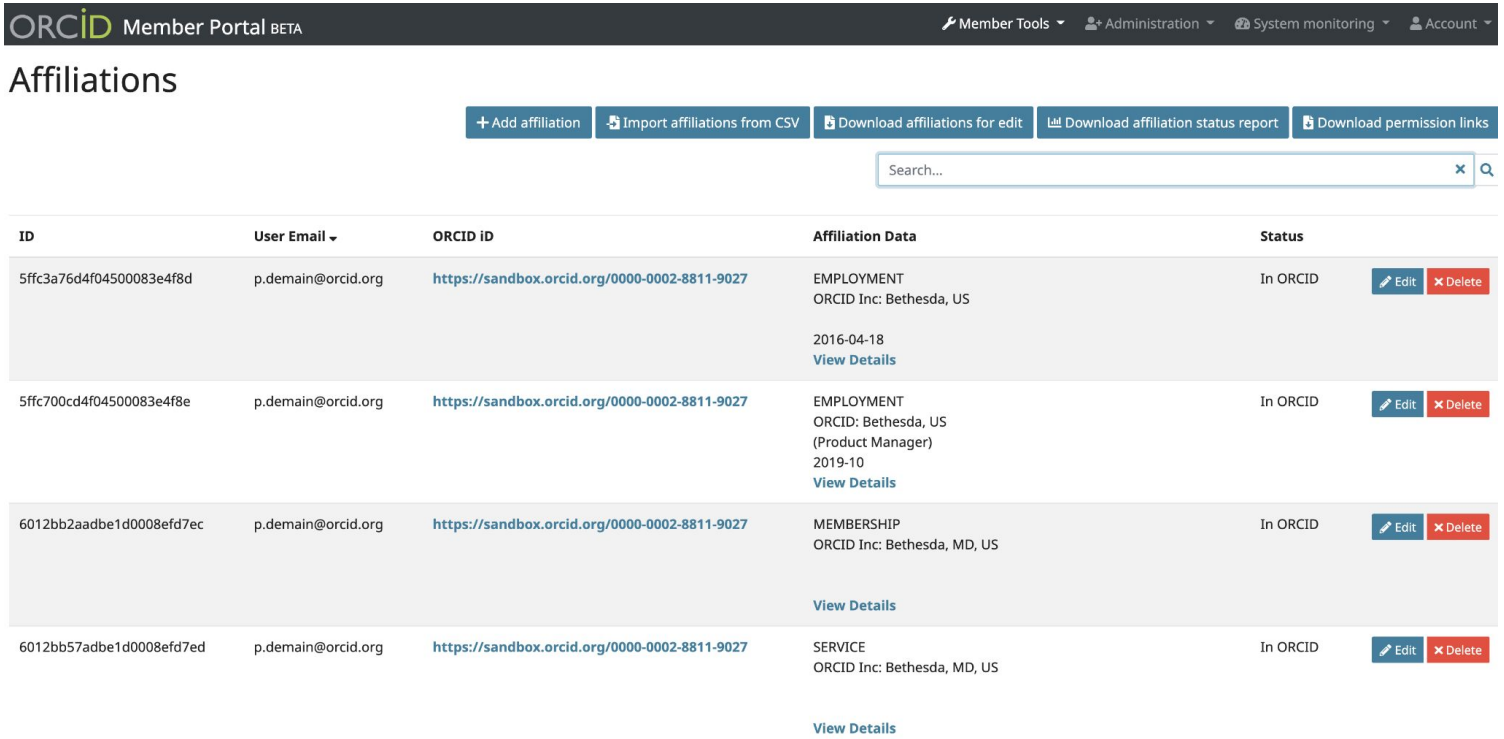
Launched - available to all consortia members

- Small number of credentials have been issued
- Ability to add, edit and delete affiliations via CSV upload
- Translation support for French and Spanish

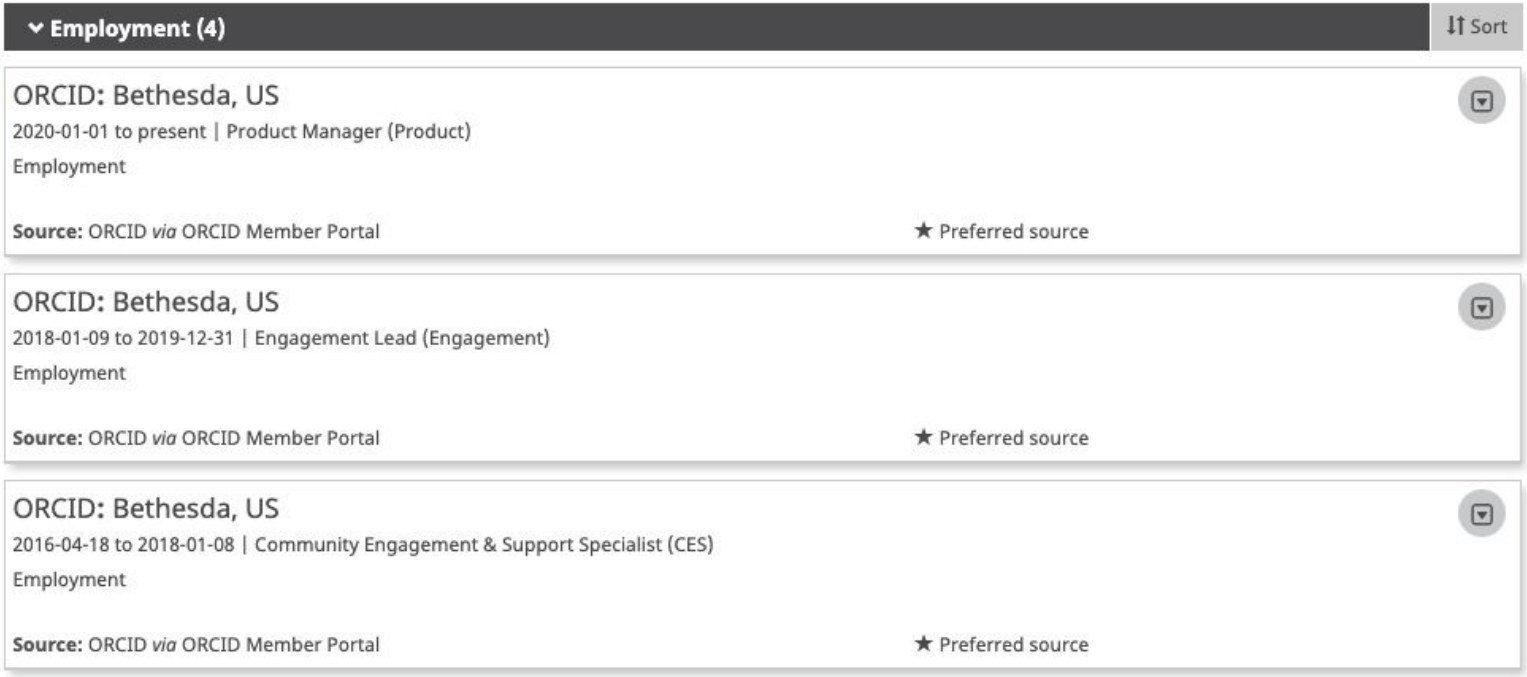
Next Up

- Increase **ADOPTION**
- Fix any issues identified by the community
- Support additional languages

Affiliation Manager



Affiliation Manager



Improved Member Reporting

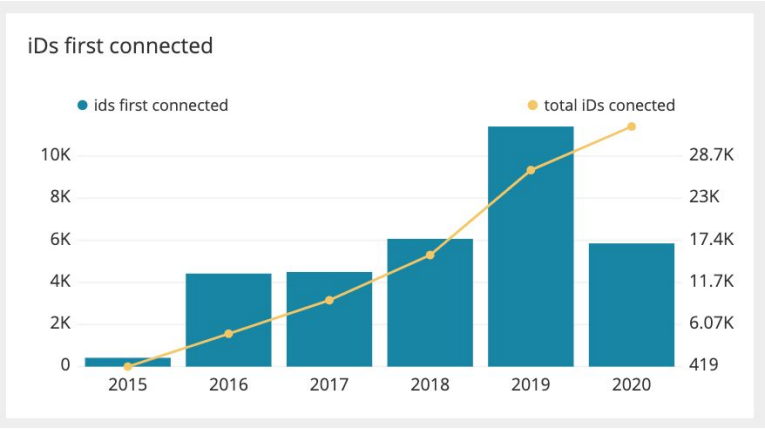
Improved member reporting is now available to **ALL** members via the member portal

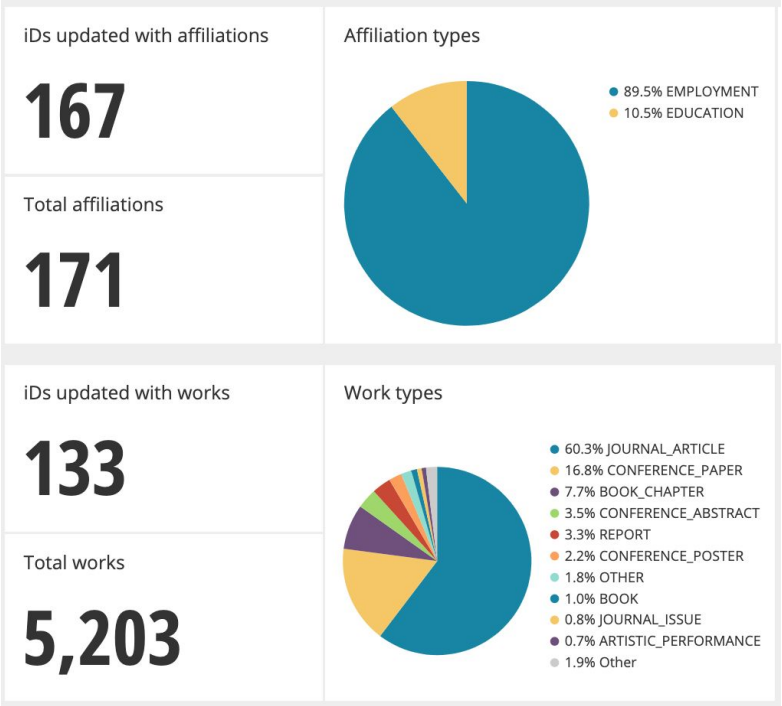
The reports provide insight into how your integrations are performing, the number of iDs they've connected to, the number of records updated, user geography *and more*.

Next up

- Increase **ADOPTION**
- Improved Premium Member reporting
- Member Service Provider reporting
- Public information statistics dashboard
- Address feedback from the community
- Migrate from Chartio to Holistics

Improved Member reporting





Support for ROR (Stage 1 - APIs)

Adding ROR IDs to the list of supported Organization IDs

ROR IDs are now supported alongside Funder Registry IDs, GRIDs and RINGGOLD IDs

Next Up

- Increase **ADOPTION**
- ROR will become the preferred ID for all user interface items
- Adding ROR data to the UI for users to manually select when adding affiliations

Support for CRediT

Added **CRediT roles** to the existing list of contributor roles

- Just roles - no degree of contributions
- Available for members using API v3.0
- Visible in the UI

Next Up

- Increase **ADOPTION**
- Allow users to select CRediT roles in the UI

Contributors
bernard bertrand (conceptualization, 0000-0001-8888-3976)
bernard bertrand (methodology, 0000-0001-8888-3976)
bernard bertrand (project administration, 0000-0001-8888-3976)
bernard bertrand (writing – original draft, 0000-0001-8888-3976)
bernard bertrand (writing – review & editing, 0000-0001-8888-3976)

Country of publication
United States

Added
2021-08-18

Last modified
2021-08-18

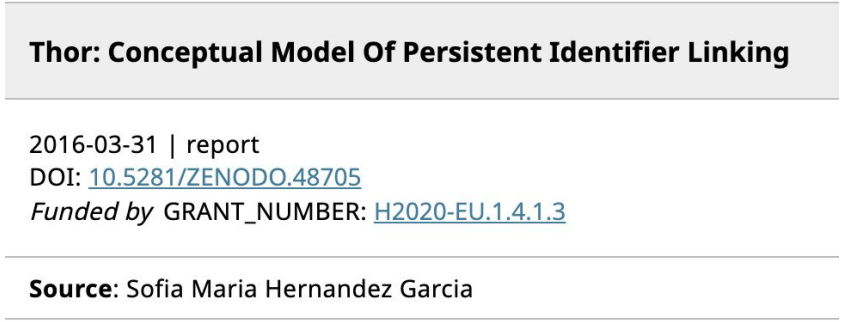
Link funding to research outputs

Ability to link funding identifiers to work items

- New relationship type for works ‘funded by’
- Available with API v3.0
- Available in the UI

Next Up

- Increase **ADOPTION**



Translations

- Registry is now **100%** translated
- Translations for member portal are coming!

Data quality

Identified and locked **150,000 spam records** in the past month using a custom machine learning algorithm tuned to minimise false positives.

Next up

- Operationalise our machine learning spam detection algorithm and run on a regular basis.

UI refresh

Working hard in tandem with the dev team to bring an updated look and feel to the ORCID registry.

Since our last meeting we've launched 2 updated sections of the Registry:

The notifications inbox

- A new-look home for all your ORCID notifications
- Easier to use, easier to scan. Stay on top of the activity in your record.

The ORCID public record

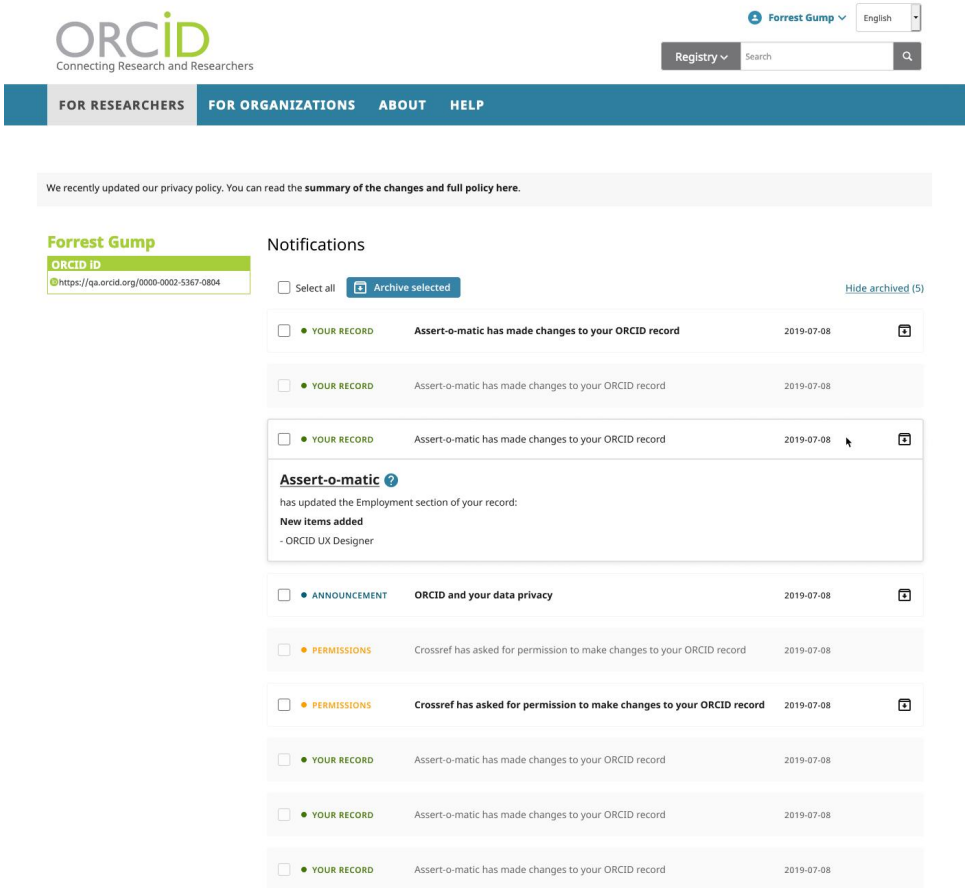
- A complete visual overhaul of the public-facing record
- Keep the density of information while making it easier to scan

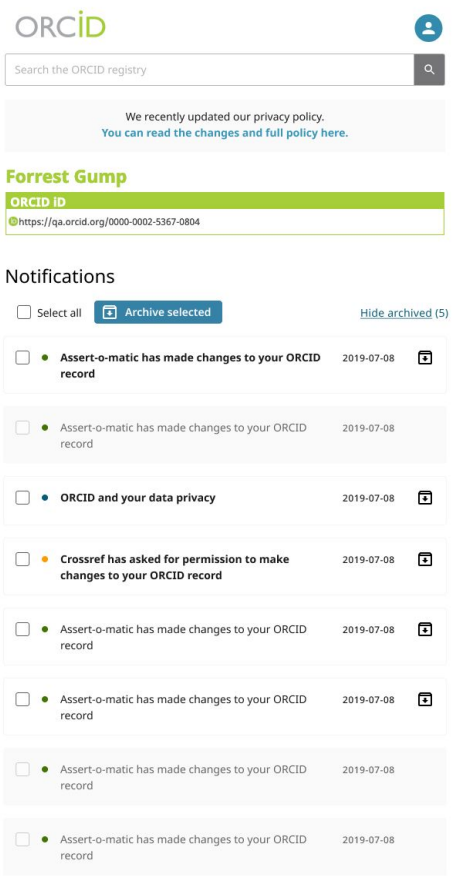
UI refresh - Notifications inbox

- Managing your activity in your ORCID record
- Make it easier to see *at a glance* what kind of notification each item is
- Improve the process of managing large numbers of notification messages

And the changes are not just in the registry UI...

- Notification emails sent to users have a new look and a simplified structure
- Quicker and clearer to spot what has changed and whether you need to do anything


ORCID
Connecting Research and Researchers
Forrest Gump
English
Registry
Search
FOR RESEARCHERS
FOR ORGANIZATIONS
ABOUT
HELP
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
Select all
Archive selected
Hide archived (5)
YOUR RECORD
Assert-o-matic has made changes to your ORCID record
2019-07-08
Assert-o-matic
has updated the Employment section of your record:
New items added
- ORCID UX Designer
ANNOUNCEMENT
ORCID and your data privacy
PERMISSIONS
Crossref has asked for permission to make changes to your ORCID record

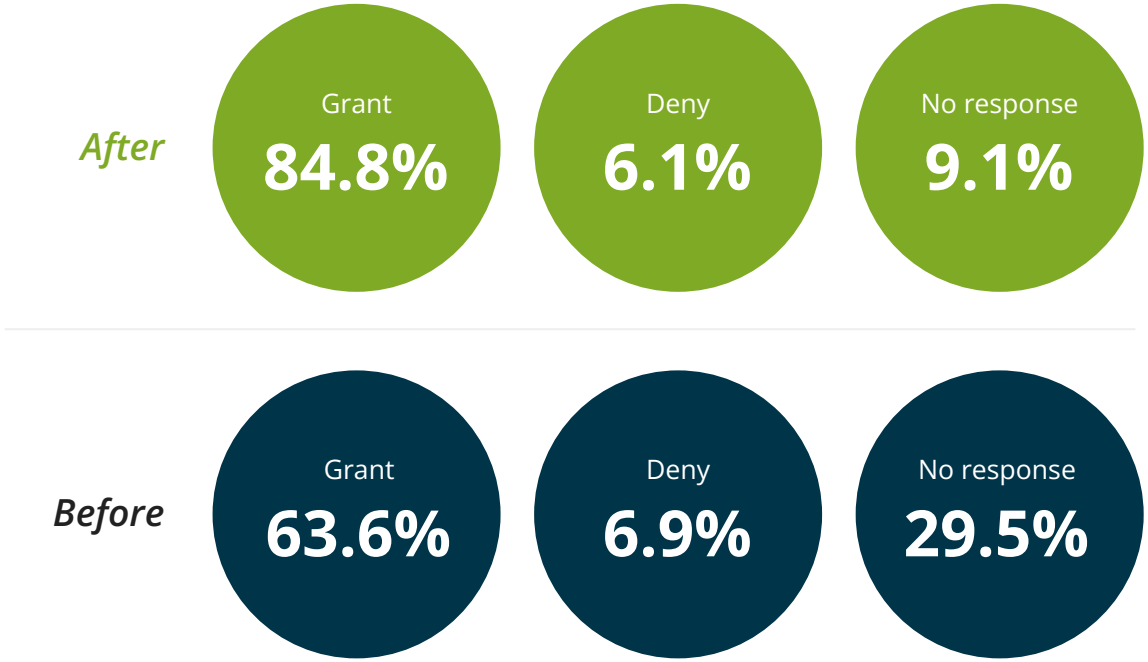

ORCID
Search the ORCID registry
We recently updated our privacy policy.
You can read the changes and full policy here.
Forrest Gump
ORCID iD
https://qa.orcid.org/0000-0002-5367-0804
Notifications
Select all
Archive selected
Hide archived (5)
Assert-o-matic has made changes to your ORCID record
2019-07-08
ORCID and your data privacy
Crossref has asked for permission to make changes to your ORCID record

UI refresh - Notifications inbox

The new notification inbox is measurably driving greater engagement with our users.

Crossref shared their auto-update stats with us...

Almost a **20% positive shift** between non-respondents to researchers actively granting permission.



UI refresh - The public record

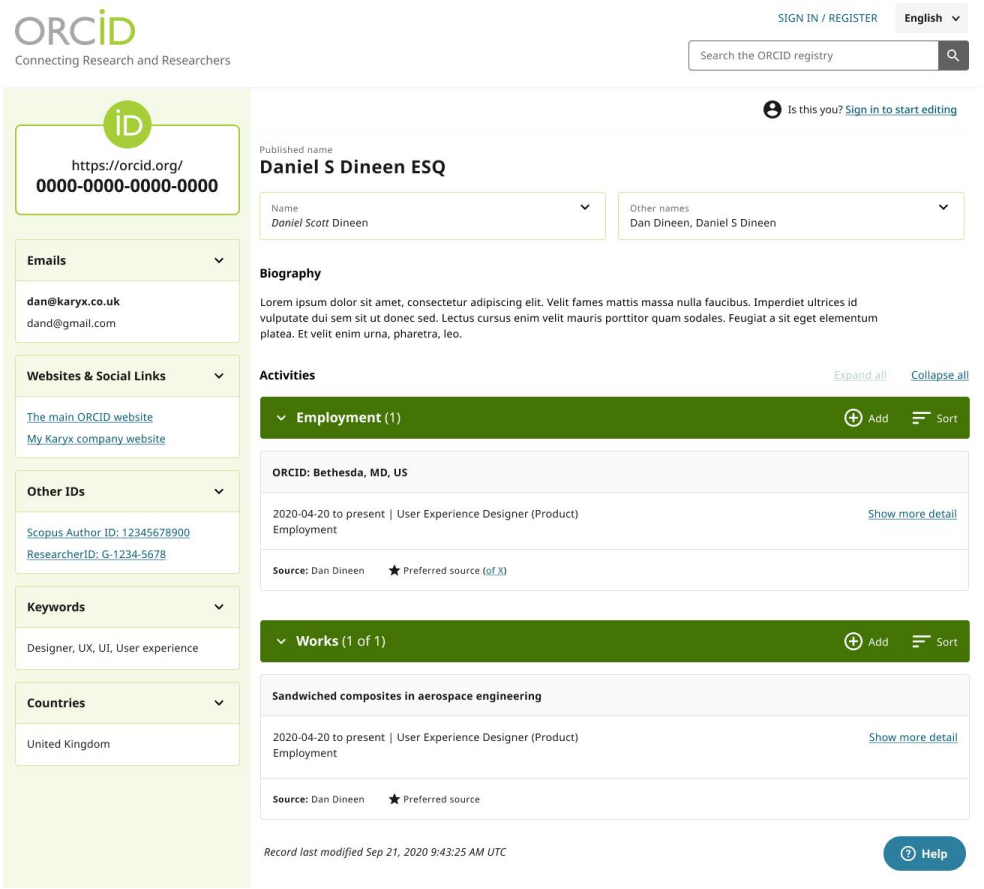
The release of the new public record page is a major milestone for the UI refresh project.

New ways of displaying information without losing *the spirit* or *the feel* of ORCID.

Always focused on the clear, concise delivery of information. Functionality wins out.

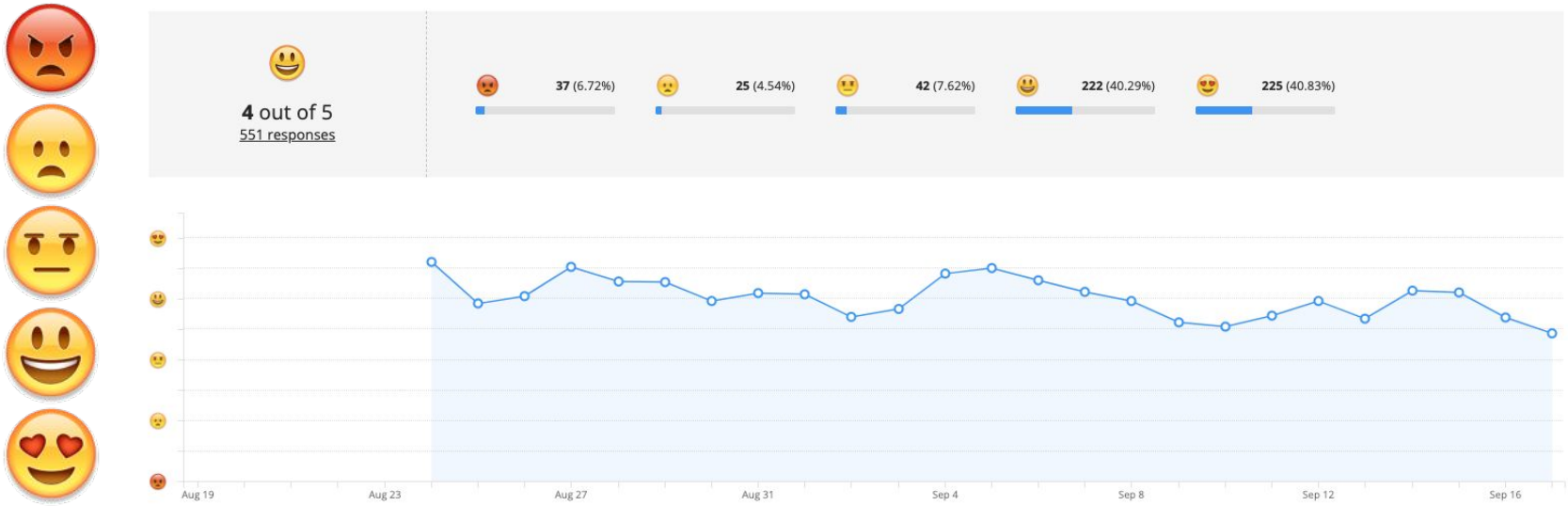
Vastly improved browsing experience on smaller devices.

It's a long way from being perfect but we are getting there!


ORCID
Connecting Research and Researchers
SIGN IN / REGISTER
English
Search the ORCID registry
https://orcid.org/
0000-0000-0000-0000
Is this you? Sign in to start editing
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.
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
Activities
Expand all
Collapse all
Employment (1)
Add
Sort
ORCID: Bethesda, MD, US
2020-04-20 to present | User Experience Designer (Product)
Employment
Show more detail
Source: Dan Dineen
Preferred source (of X)
Works (1 of 1)
Add
Sort
Sandwiched composites in aerospace engineering
2020-04-20 to present | User Experience Designer (Product)
Employment
Show more detail
Source: Dan Dineen
Preferred source
Record last modified Sep 21, 2020 9:43:25 AM UTC
Help

UI refresh - The public record

To coincide with the launch of the public page we also fired up a simple survey tab to gather some high-level feedback and thoughts on our new look.



FEEDBACK

Next up

UI refresh - My ORCID

Now the new public page is live we're working hard to get the private side of the ORCID record out there too.

Where the magic happens - updating personal and bio information, managing activities and shaping how your record is seen by everyone.

Changes on the way designed to make updating your ORCID record quicker, easier and more enjoyable.

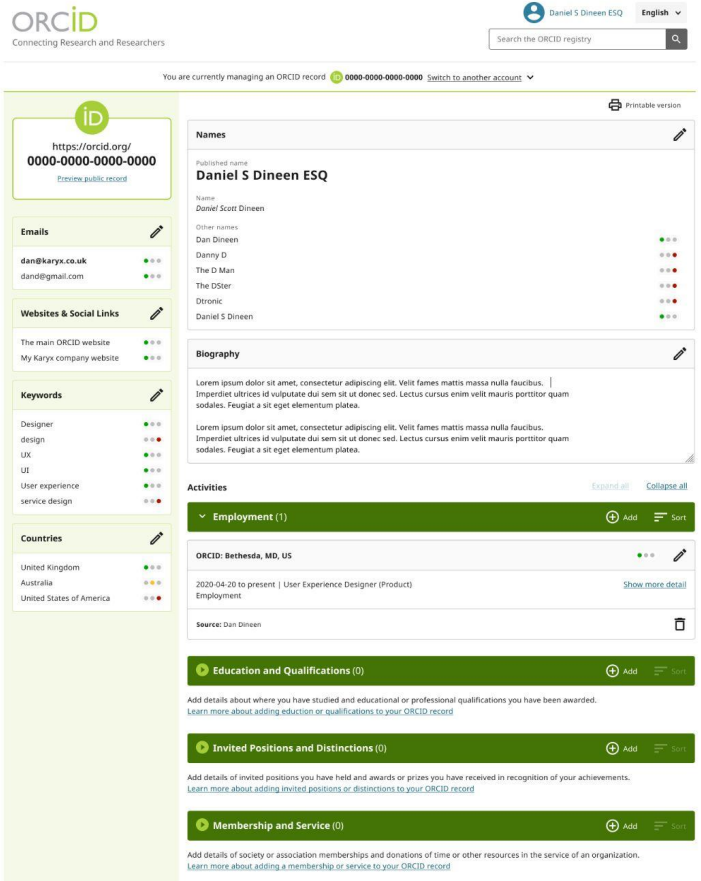
Carrying through the updated UI from the public page. Building on the ORCID design system.

UI refresh - My ORCID

A new look for your private record
Cleaner, simpler and easier to use.

Visibility overview
Quickly see the visibility status of every item in your record.

The same information, just better
Everything you love about ORCID but in a compact, elegant and functional style.

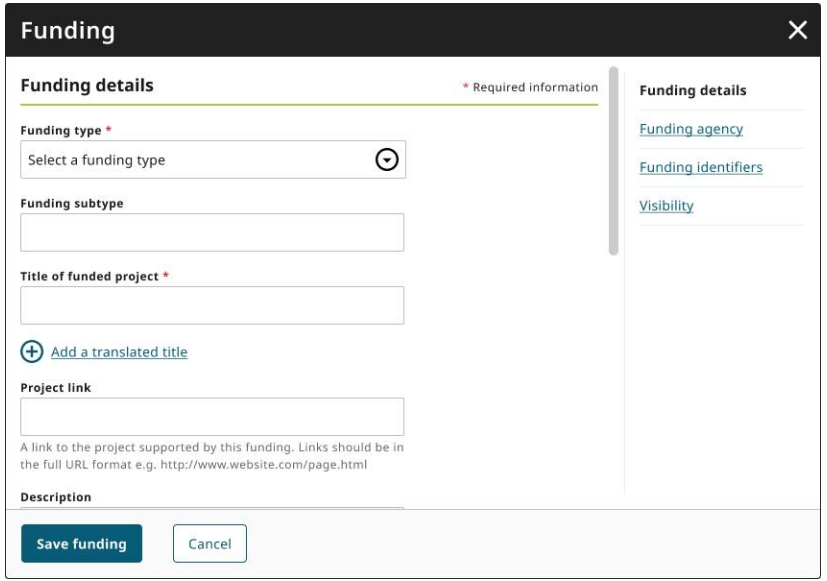


UI refresh - My ORCID/Forms

Simplified, standardised forms
Add your information quickly and easily with our re-worked forms

Move quickly between form sections
A new form outline quick nav lets you jump between form sections. It also gives you an overview of what's in the form.

Consistent editing behaviours
Edit one thing and you know how to edit everything else. *No more surprises.*



Delete still an option

Ability to delete items even when the user has revoked permission

- Privacy policy updated to reflect change
- Allow organizations to remove inaccuracies
- Trusted organizations UI will be amended
- Revocation is rare and very few records will be impacted

Looking forward

Member Portal Development

Goal

Develop new features that will support Consortia Leads and members with managing their membership information and API credentials

Next Steps...

- Managing member listing information
- Managing ORCID membership contacts
- Managing member API credentials

Proactively Delegate Permissions

Goal

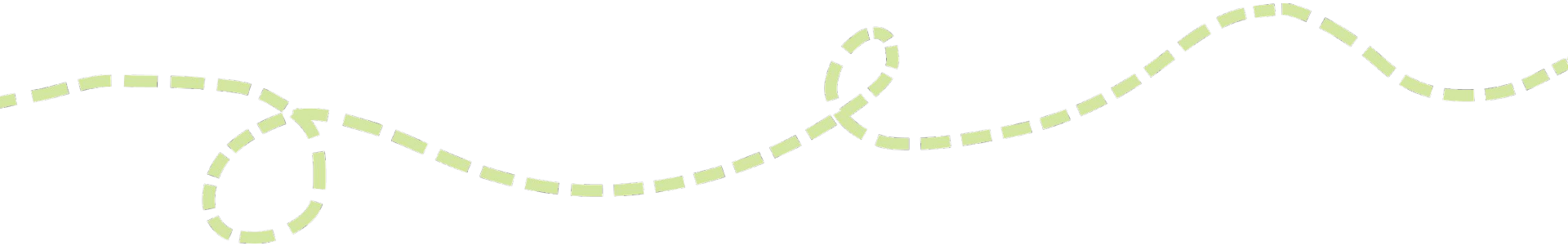
Reduce burden on users having to provide multiple permissions within the publishing workflow.

Next Steps...

- Investigate if users could grant more than one ORCID API client permission during one workflow
- Survey users to see if this is something that they would be interested in

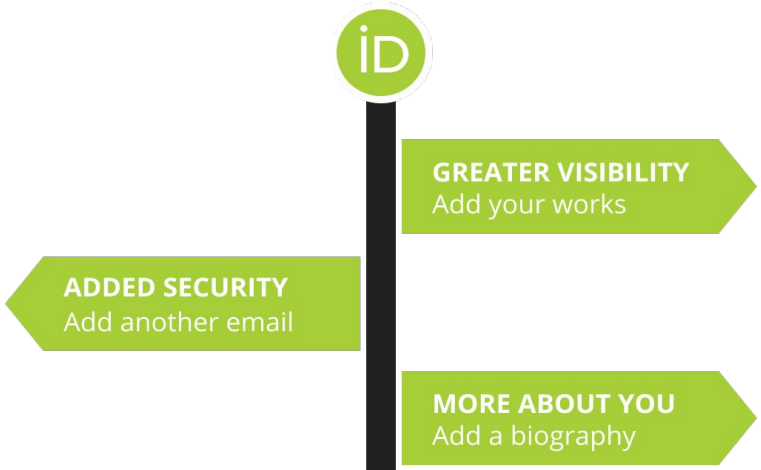
Improve the new user journey

- Guidance and support during those early stages
- A clear path for progression. No more “What do I do now?”
- Avoid over-explanation, hand-holding or aggressive railroading
- The researcher is always in charge



Encouragement ‘toolkit’

- A series of features designed to provide a little ‘push’ when needed
- Use real language where we can
- Clarification on complex terms or service jargon
- Hints, guides and ‘helpers’ to keep people moving
- Stay out of the way unless we’re needed
- Help is always available



Contributors and co-authors

Goal

Increase the amount of contributor data within the registry

Next Steps...

- Investigate the option for users to specify their co-authors roles on works, enabling users to say who worked on what
- Ongoing discovery work looking at how people use contributor information
- Look to the future - what *could* we do with this information?

Accessibility audit

Goal

Confirm how far we've come and how far we have left to go!

Next Steps...

- Further iterative updates as we continue to remove barriers to access
- Issue an updated, expanded accessibility statement

Have a question?

Raise your hand and
we'll unmute you

Raised Hands graphic
Democracy by Wichai Wi from the Noun Project

Product Interest Group

Thanks for listening