



Product Interest Group

Tuesday 28 September 2021

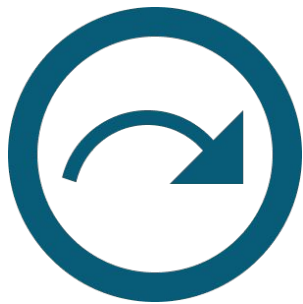


Agenda

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

Affiliations

+ Add affiliation Import affiliations from CSV Download affiliations for edit Download affiliation status report Download permission links

Search... Q

ID	User Email	ORCID ID	Affiliation Data	Status
5ffc3a76d4f0450083e4f8d	p.demain@orcid.org	https://sandbox.orcid.org/0000-0002-8811-9027	EMPLOYMENT ORCID Inc: Bethesda, US 2016-04-18 View Details	In ORCID Edit Delete
5ffc700cd4f0450083e4f8e	p.demain@orcid.org	https://sandbox.orcid.org/0000-0002-8811-9027	EMPLOYMENT ORCID: Bethesda, US (Product Manager) 2019-10 View Details	In ORCID Edit Delete
6012bb2aadbe1d0008efd7ec	p.demain@orcid.org	https://sandbox.orcid.org/0000-0002-8811-9027	MEMBERSHIP ORCID Inc: Bethesda, MD, US View Details	In ORCID Edit Delete
6012bb57adbe1d0008efd7ed	p.demain@orcid.org	https://sandbox.orcid.org/0000-0002-8811-9027	SERVICE ORCID Inc: Bethesda, MD, US View Details	In ORCID Edit Delete



Affiliation Manager

▼ Employment (4)		↕ Sort
ORCID: Bethesda, US 2020-01-01 to present Product Manager (Product) Employment	Source: ORCID via ORCID Member Portal	★ Preferred source
ORCID: Bethesda, US 2018-01-09 to 2019-12-31 Engagement Lead (Engagement) Employment	Source: ORCID via ORCID Member Portal	★ Preferred source
ORCID: Bethesda, US 2016-04-18 to 2018-01-08 Community Engagement & Support Specialist (CES) Employment	Source: ORCID via ORCID Member Portal	★ Preferred source

Improved Member Reporting

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

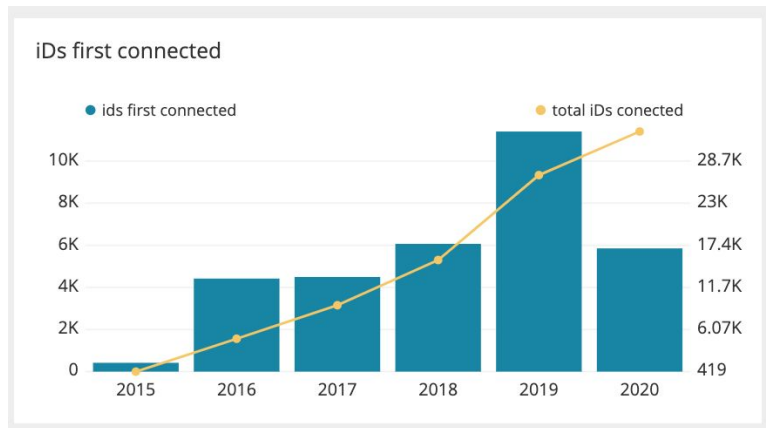
The reports provide insight into how your integrations are performing, the number of iDs they've connected to, the number of records updated, user geography *and more*.

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



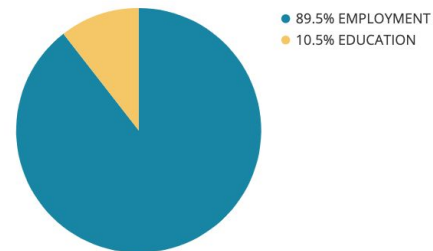
iDs updated with affiliations

167

Total affiliations

171

Affiliation types



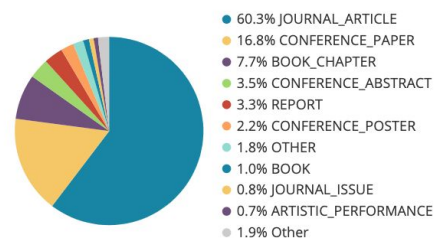
iDs updated with works

133

Total works

5,203

Work types



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**

Thor: Conceptual Model Of Persistent Identifier Linking

2016-03-31 | report

DOI: [10.5281/ZENODO.48705](https://doi.org/10.5281/ZENODO.48705)

Funded by GRANT_NUMBER: [H2020-EU.1.4.1.3](#)

Source: Sofia Maria Hernandez Garcia



Translations

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

تامجر نال

Traducciones

TRANSLATIONS

翻译

Traduções



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



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 \(5\)](#)

<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	
<p>Assert-o-matic </p> <p>has updated the Employment section of your record:</p> <p>New items added</p> <ul style="list-style-type: none"> ORCID UX Designer 				
<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	
<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	

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ORCID ID

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Notifications

☐ Select all

☒ Archive selected

[Hide archived \(5\)](#)

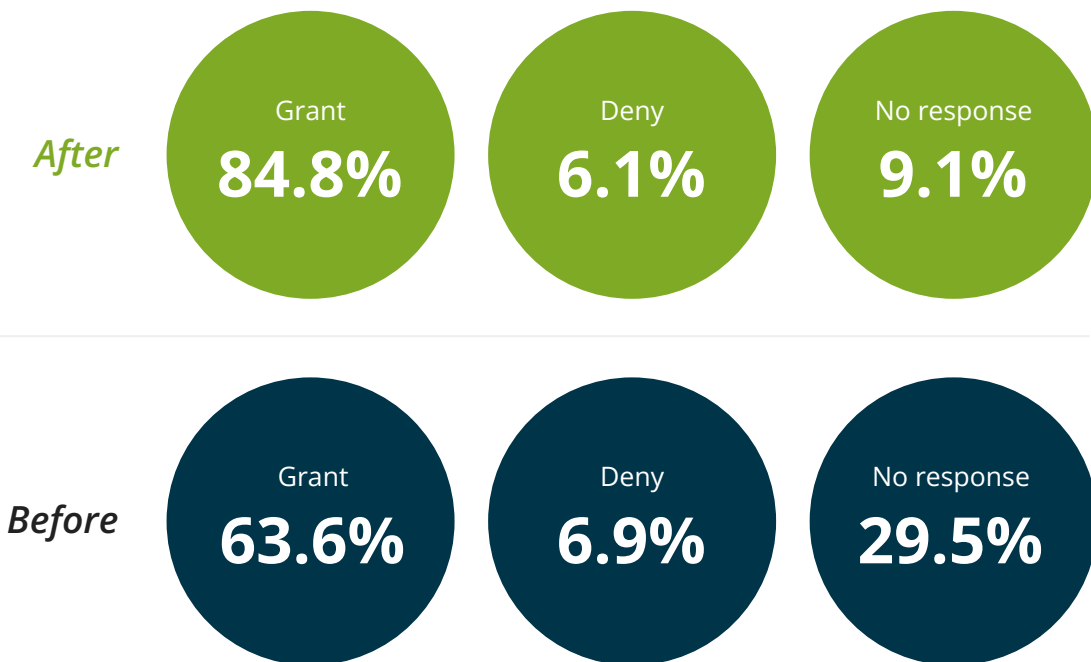
<input type="checkbox"/>	● Assert-o-matic has made changes to your ORCID record	2019-07-08	
<input type="checkbox"/>	● Assert-o-matic has made changes to your ORCID record	2019-07-08	
<input type="checkbox"/>	● ORCID and your data privacy	2019-07-08	
<input type="checkbox"/>	● Crossref has asked for permission to make changes to your ORCID record	2019-07-08	
<input type="checkbox"/>	● Assert-o-matic has made changes to your ORCID record	2019-07-08	
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<input type="checkbox"/>	● Assert-o-matic has made changes to your ORCID record	2019-07-08	
<input type="checkbox"/>	● Assert-o-matic has made changes to your ORCID record	2019-07-08	

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!





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



<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.

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 3)

▾ 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

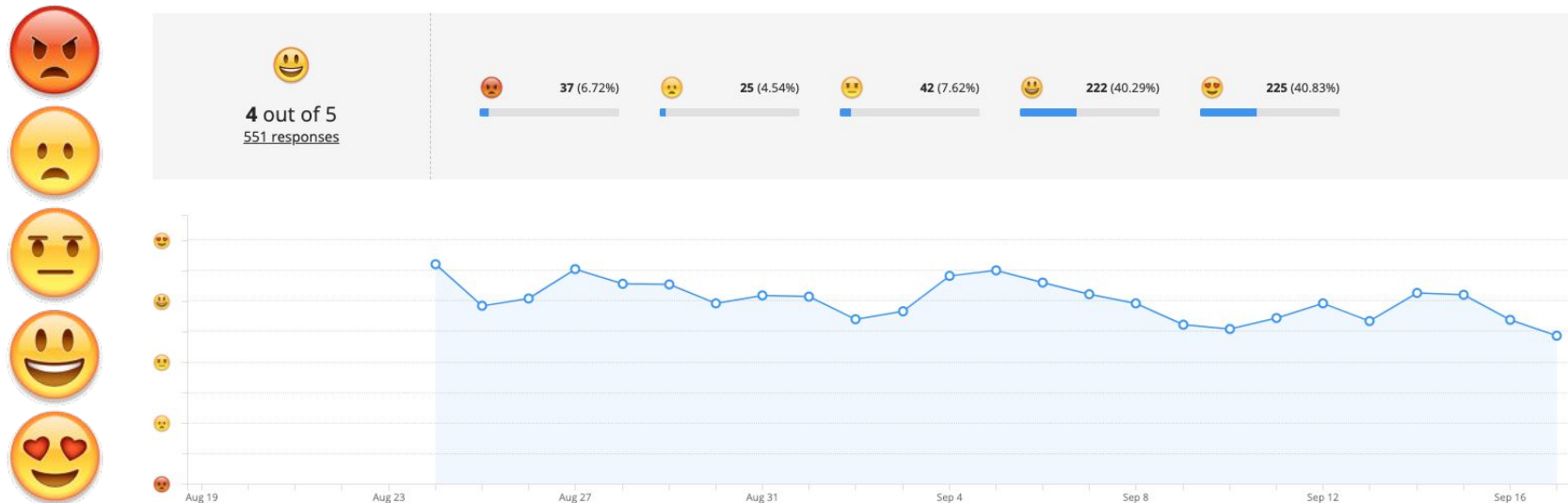
Record last modified Sep 21, 2020 9:43:25 AM UTC

[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.

The screenshot displays the 'My ORCID' interface for user Daniel S Dineen ESQ. The top navigation bar includes the ORCID logo, the user's name, a language dropdown set to 'English', and a search bar. Below the navigation bar, a status message indicates the user is managing an ORCID record with the ID 0000-0000-0000-0000 and provides a link to switch to another account. The main content area is divided into two columns. The left column contains a profile card with the ORCID ID and a link to the public record, followed by sections for Emails, Websites & Social Links, Keywords, and Countries, each with a list of items and a visibility status indicator. The right column contains sections for Names, Biography, and Activities. The Activities section is expanded, showing a list of activities including Employment, Education and Qualifications, Invited Positions and Distinctions, and Membership and Service, each with a list of items and a visibility status indicator.

ORCID
Connecting Research and Researchers

Daniel S Dineen ESQ English

Search the ORCID registry

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

Printable version

Names

Published name
Daniel S Dineen ESQ

Name
Daniel Scott Dineen

Other names
Dan Dineen
Danny D
The D Man
The DSlur
Oronic
Daniel S Dineen

Biography

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

Activities

Expand all Collapse all

Employment (1)

ORCID: Bethesda, MD, US

2020-04-20 to present | User Experience Designer (Product)

Employment

Source: Dan Dineen

Education and Qualifications (0)

Add details about where you have studied and educational or professional qualifications you have been awarded.
[Learn more about adding education or qualifications to your ORCID record](#)

Invited Positions and Distinctions (0)

Add details of invited positions you have held and awards or prizes you have received in recognition of your achievements.
[Learn more about adding invited positions or distinctions to your ORCID record](#)

Membership and Service (1)

Add details of society or association memberships and donations of time or other resources in the service of an organization.
[Learn more about adding a membership or service to your ORCID record](#)



UI refresh - My ORCID/Forms

Simplified, standardised forms

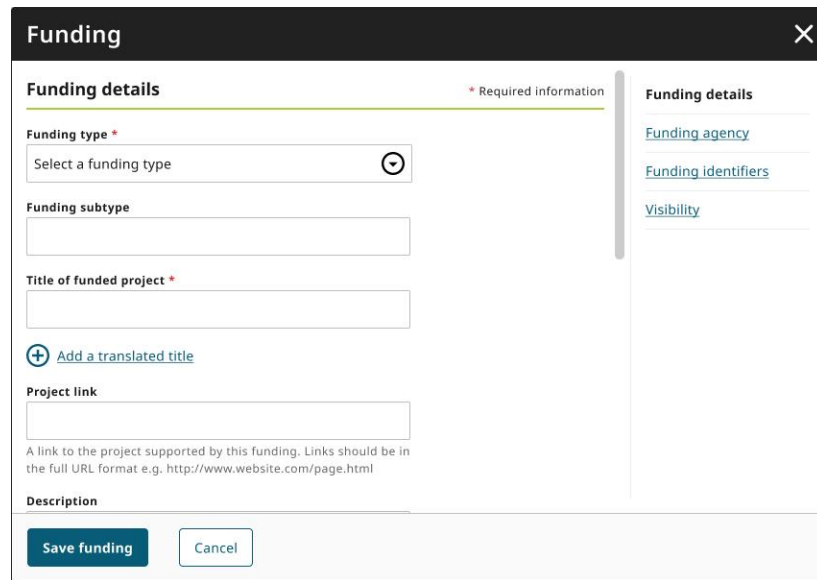
Add your information quickly and easily with our re-worked forms

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.*



The screenshot displays a web form titled "Funding" with a close button (X) in the top right corner. The form is divided into two main sections: a sidebar on the right and a main content area on the left.

Form Structure:

- Form Title:** Funding
- Section Header:** Funding details (marked with a red asterisk for required information)
- Form Fields:**
 - Funding type ***: A dropdown menu with the text "Select a funding type" and a circular arrow icon.
 - Funding subtype**: A text input field.
 - Title of funded project ***: A text input field.
 - + Add a translated title**: A link with a plus icon.
 - Project link**: A text input field.
 - Description**: A text input field.
- Footer:** Two buttons: "Save funding" (dark blue) and "Cancel" (light blue).

Right Sidebar:

- Section Header:** Funding details
- Links:**
 - [Funding agency](#)
 - [Funding identifiers](#)
 - [Visibility](#)

Help Text:

A link to the project supported by this funding. Links should be in the full URL format e.g. <http://www.website.com/page.html>

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

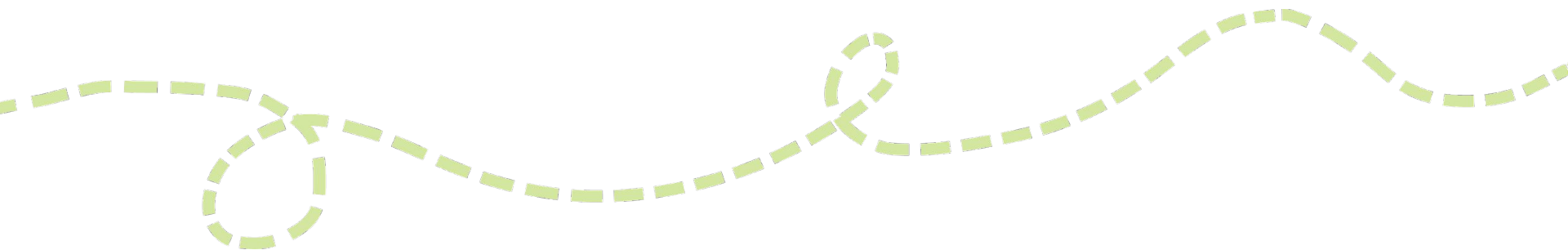
Reduce burden on users having to provide multiple permissions within the publishing workflow.

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





Product Interest Group

Thanks for listening

