ORCID Support & ORCID Support Advance

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Overview

• Two Bazaar plugins to provide ORCID functionality:

ORCID Support
Basic functionality, providing minimum requirements for storing ORCIDS.

ORCID Support Advance:
Integration with orcid.org through member API.
ORCID Support
ORCID Support – ORCID Field

• New ORCID field type
  ▪ Added to the EPrint ‘Creators’ and ‘Editors’ fields...
  ▪ ...and added to the User records.
ORCID Support – ORCID Field

• New ORCID field type
  ▪ Validates the ORCID is in the correct format, i.e. 16 digits broken into 4 groups of 4.
  ▪ Checks the final digit of the ORCID that acts as a checksum, ensuring the ORCID is valid.
  ▪ A warning is displayed to the user if the ORCID is wrong.
ORCID Support – ORCID Field

• New ORCID field type
  ▪ Displays as a link to the ORCID profile with a green ORCID badge
  ▪ Citations may be updated to display ORCID green badges which show a link to the ORCID profile when hovered over.
ORCID Support – Reports

• An ‘ORCID Dashboard’ provides reports with the Generic Reporting Framework installed.
  ▪ ‘All users with and without ORCIDs’ displays users without ORCIDs in red.
  ▪ ‘Users with ORCIDs’ displays granted permissions (with ORCID Support Advance)
  ▪ ‘Creators with ORCIDs’ highlights EPrint records with ORCIDs.
ORCID Support – RIOXX & UKETD_DC

• Where RIOXX is installed, ORCIDs will be added as an ID attribute for `<rioxxterms:author>` elements.

• Where the UKETD_DC export plugin is installed, ORCID will be added to OAI results ready for EThOS harvesting, e.g.

```xml
<uketdterms:authoridentifier xsi:type="uketdterms:ORCID"
>0000000168674536</uketdterms:authoridentifier>
```
ORCID Support Advance - Setup
ORCID Support Advance - Setup

• To use the ORCID Support Advance plugin, institutions will first need to acquire the following details from orcid.org.
  ▪ client_id
  ▪ client_secret

• To acquire these you will need to ‘Register a client application’ at: https://orcid.org/node/176
  • Further information about how to do this is available at: https://support.orcid.org/knowledgebase/articles/116739
ORCID Support Advance - Connect

- Once installed ORCID fields will no longer be directly editable
  - Necessary to qualify for access to member production API
- Users can connect their repository account via the ‘Connect to ORCID’ link in the main menu.

- ORCIDs are added to ‘Creators’ and ‘Editors’ via lookup against user profiles, or via DOI imports.
ORCID Support Advance - Connect

• Once clicked, users will then need to specify which permissions they grant the repository when connecting to their orcid.org profile.

1) “Connect to ORCID”

2) “Create and update publication details on your ORCID record”

3) “Retrieve restricted details from your ORCID profile”
ORCID Support Advance - Connect

- Having set permissions, clicking the button links the user through to orcid.org where they may authorize the permissions.
ORCID Support Advance - Import

• Accessible via ‘Manage Deposits’ and user ‘Profile’ screens.
• Each work available in the user’s orcid.org profile is available to import.
• Metadata is mapped over to EPrints where possible.
• Cannot reimport duplicates found in the repository’s live archive
  ▪ Using DOIs or ORCID ‘put-code’
ORCID Support Advance - Export

• Accessible via ‘Manage Deposits’ and user ‘Profile’ screens.
• Each record from the repository’s live archive where the user’s ORCID is listed as one of the ‘Creators’.
• orcid.org profile prevents the same record from being imported more than once.
ORCID Support Advance – Export

• When the ‘Create and update publication details on your ORCID record’ permission is granted, the repository will try to update the user’s orcid.org profile.
  • The institution will be added to the ‘Employment’ section of the ORCID profile.
  • Alternatively, the ‘Education’ section may be updated for specific repository user types (requires behind-the-scenes configuration).
ORCID Support Advance - Report

- Highlights where a user’s name in their repository user profile differs from their name in their orcid.org profile.
Conclusions

• **ORCID Support** is required before **ORCID Support Advance** can be used.

• **ORCID Support** provides basic ORCID functionality, allowing ORCIDs to be stored, validated and reported upon.

• **ORCID Support Advance** integrates with orcid.org via the member API
  - Prevents ORCID field from being editable, but can be populated via other means.
  - Pending approval from ORCID, repositories will qualify for ORCID ‘Collect & Connect’ badges.

• If you’d like further developments concerning ORCID... let Jisc know!