

ORCID Support & ORCID Support Advance

Will Fyson

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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:

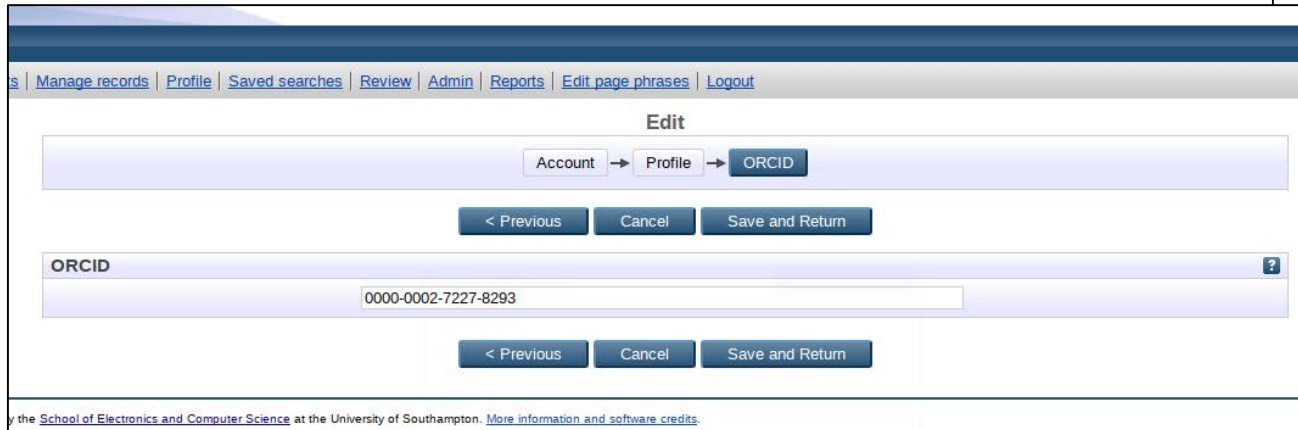
Integration with orcid.org through member API.

ORCID Support

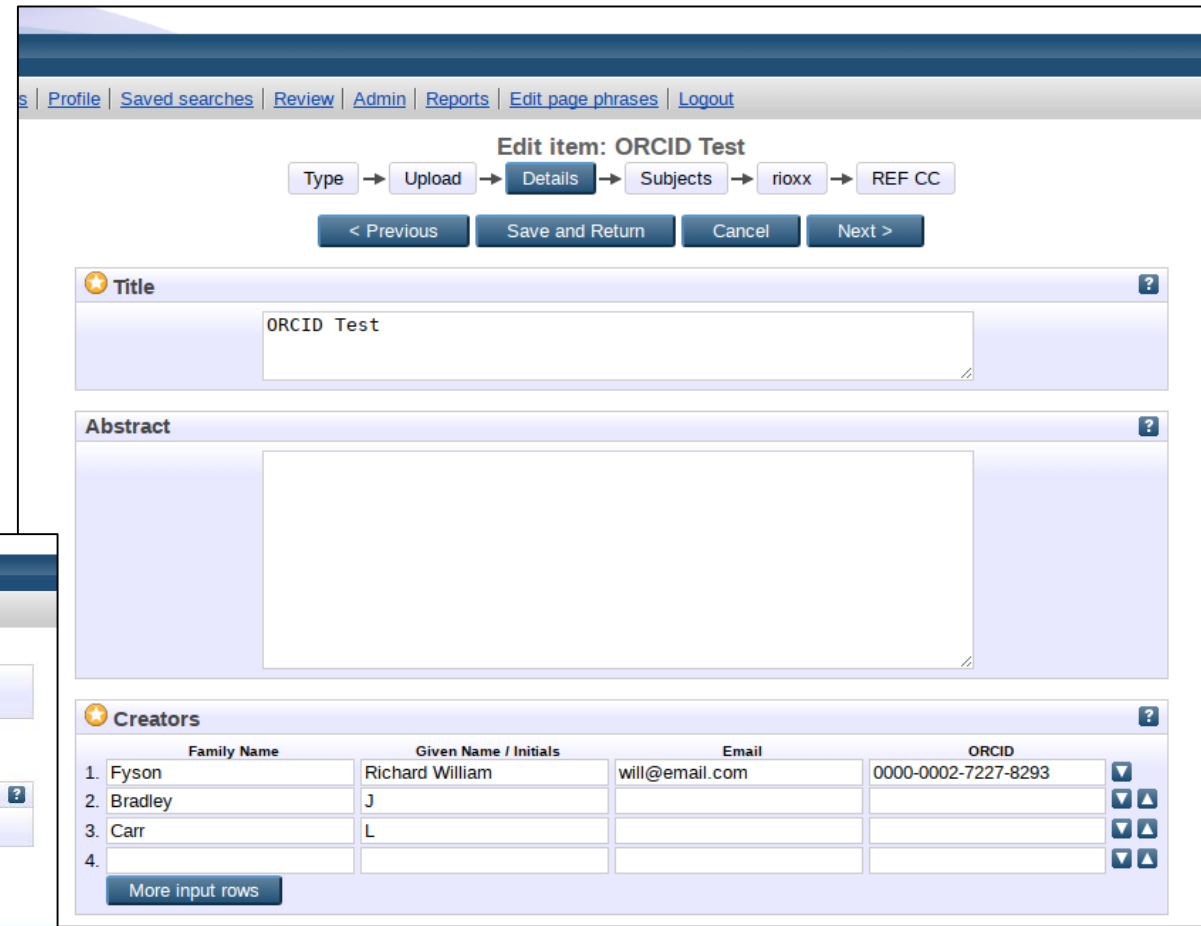


ORCID Support – ORCID Field

- New ORCID field type
 - Added to the EPrint 'Creators' and 'Editors' fields...
 - ...and added to the User records.



The screenshot shows the 'Edit' page for a user record. At the top, there is a navigation bar with links: Manage records, Profile, Saved searches, Review, Admin, Reports, Edit page phrases, Logout. Below this is a breadcrumb trail: Account → Profile → ORCID. There are buttons for '< Previous', 'Cancel', and 'Save and Return'. The main content area has a section titled 'ORCID' with a text input field containing the value '0000-0002-7227-8293'. Below the input field are buttons for '< Previous', 'Cancel', and 'Save and Return'.

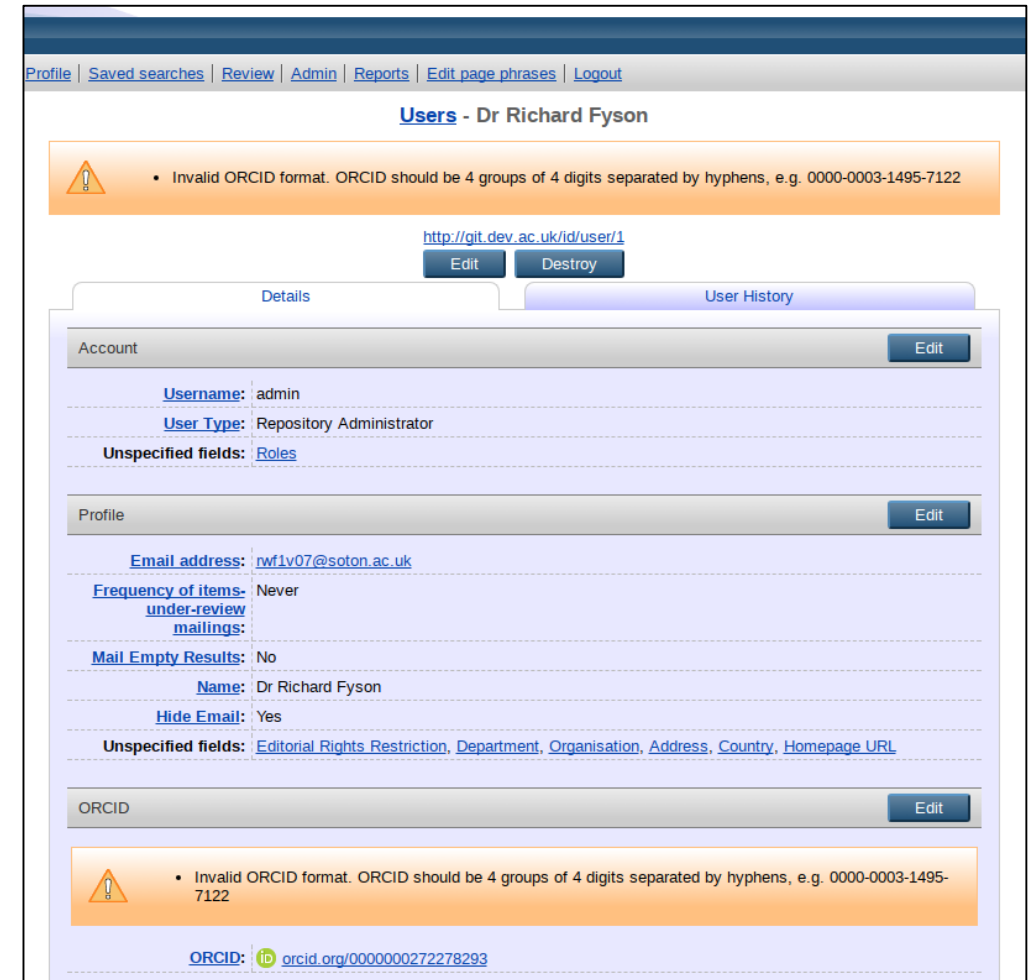



The screenshot shows the 'Edit item: ORCID Test' page. At the top, there is a navigation bar with links: Profile, Saved searches, Review, Admin, Reports, Edit page phrases, Logout. Below this is a breadcrumb trail: Type → Upload → Details → Subjects → rioxx → REF CC. There are buttons for '< Previous', 'Save and Return', 'Cancel', and 'Next >'. The main content area has three sections: 'Title' with a text input field containing 'ORCID Test'; 'Abstract' with a large text area; and 'Creators' with a table. The 'Creators' table has columns for Family Name, Given Name / Initials, Email, and ORCID. The table contains four rows of data, with the first row being 'Fyson', 'Richard William', 'will@email.com', and '0000-0002-7227-8293'. There are also 'More input rows' and navigation buttons for the table.

	Family Name	Given Name / Initials	Email	ORCID
1.	Fyson	Richard William	will@email.com	0000-0002-7227-8293
2.	Bradley	J		
3.	Carr	L		
4.				

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.



The screenshot shows the 'Users - Dr Richard Fyson' page in the eprints system. At the top, there is a navigation bar with links for Profile, Saved searches, Review, Admin, Reports, Edit page phrases, and Logout. Below this, the user's name 'Users - Dr Richard Fyson' is displayed. A prominent orange warning banner at the top of the main content area contains a warning icon and the text: 'Invalid ORCID format. ORCID should be 4 groups of 4 digits separated by hyphens, e.g. 0000-0003-1495-7122'. Below the warning, there is a link to 'http://git.dev.ac.uk/id/user/1' and two buttons: 'Edit' and 'Destroy'. The main content area is divided into two tabs: 'Details' (selected) and 'User History'. Under the 'Details' tab, there are three sections: 'Account', 'Profile', and 'ORCID'. Each section has an 'Edit' button. The 'Account' section shows 'Username: admin' and 'User Type: Repository Administrator'. The 'Profile' section shows 'Email address: rwf1v07@soton.ac.uk', 'Frequency of items under-review mailings: Never', 'Mail Empty Results: No', 'Name: Dr Richard Fyson', and 'Hide Email: Yes'. The 'ORCID' section shows 'ORCID:  orcid.org/0000000272278293'. At the bottom of the page, there is another orange warning banner with the same text as the one at the top.

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.



[Home](#) | [Manage records](#) | [Profile](#) | [Saved searches](#) | [Review](#) | [Admin](#) | [Reports](#) | [Logout](#)

ORCID Test


Tools

Fyson, RW  and Bradley, J  (2017) *ORCID Test*. Journal. (In Press)

ORCID: 0000-0002-7227-8293

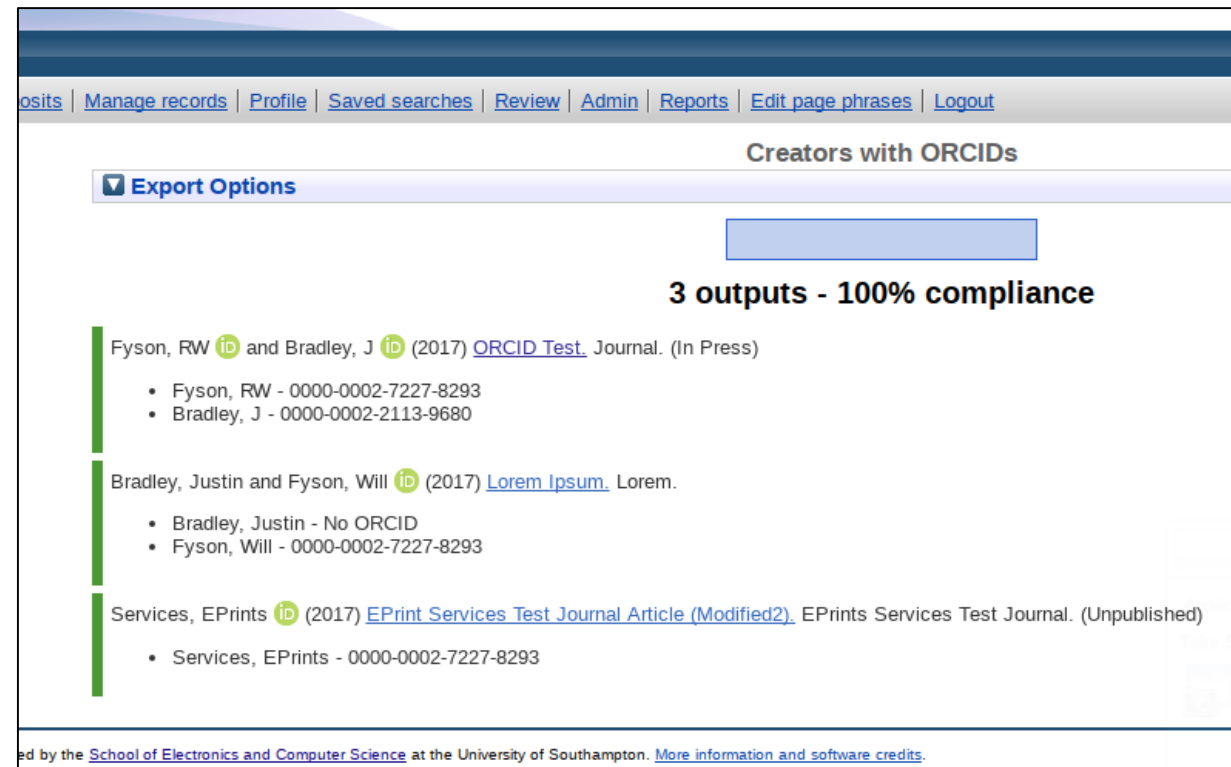
 hello.pdf - Accepted Version
 Restricted to Repository staff only until 1 December 2017.
[Download \(6kB\)](#)

Item Type: Article
Divisions: [Faculty of Engineering, Science and Mathematics > School of Chemistry](#)
Depositing User: [Mr EP Services](#)
Date Deposited: 04 Jul 2017 09:28
Last Modified: 16 Aug 2017 09:23
URI: <http://ref.eprints-hosting.org/id/eprint/4>

Details			
Creators:	Creators	Email	ORCID
	Fyson, R.W.	will@email.com	 orcid.org/0000-0002-7227-8293
	Bradley, J.	UNSPECIFIED	UNSPECIFIED
	Carr, L.	UNSPECIFIED	UNSPECIFIED
Title:	ORCID Test		
Status:	Published		

ORCID Support – Reports

- An ‘ORCID Dashboard’ provides reports with the *Generic Reporting Framework* installed.
 - ‘All users with and without ORCID’s’ displays users without ORCID’s in red.
 - ‘Users with ORCID’s’ displays granted permissions (with *ORCID Support Advance*)
 - ‘Creators with ORCID’s’ highlights EPrint records with ORCID’s.





osits | [Manage records](#) | [Profile](#) | [Saved searches](#) | [Review](#) | [Admin](#) | [Reports](#) | [Edit page phrases](#) | [Logout](#)


Creators with ORCID's

Export Options


3 outputs - 100% compliance

Fyson, RW  and Bradley, J  (2017) [ORCID Test](#). Journal. (In Press)

- Fyson, RW - 0000-0002-7227-8293
- Bradley, J - 0000-0002-2113-9680

Bradley, Justin and Fyson, Will  (2017) [Lorem Ipsum](#). Lorem.

- Bradley, Justin - No ORCID
- Fyson, Will - 0000-0002-7227-8293

Services, EPrints  (2017) [EPrint Services Test Journal Article \(Modified2\)](#). EPrints Services Test Journal. (Unpublished)

- Services, EPrints - 0000-0002-7227-8293

ed by the [School of Electronics and Computer Science](#) at the University of Southampton. [More information and software credits](#).

ORCID Support – RIOXX & UKETD_DC

- Where RIOXX is installed, ORCID IDs 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.

```
<uketdterms:authoridentifier xsi:type="uketdterms:ORCID" >0000000168674536</uketdterms:authoridentifier>
```


ORCID Support Advance - Setup

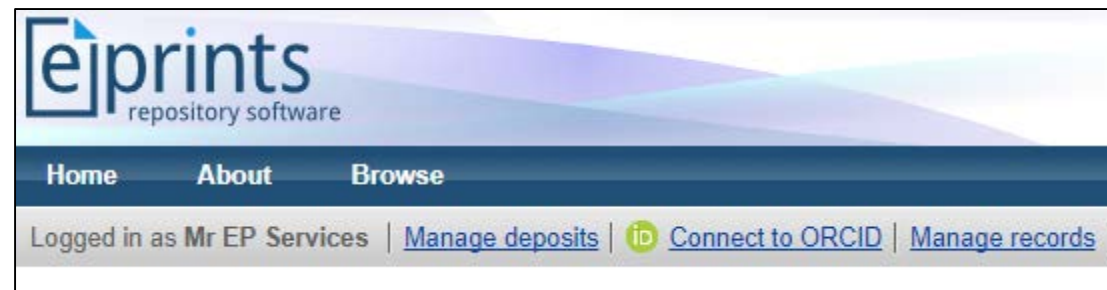


ORCID Support Advance - Setup

- 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.



- ORCID IDs are added to 'Creators' and 'Editors' via lookup against user profiles, or via DOI imports.

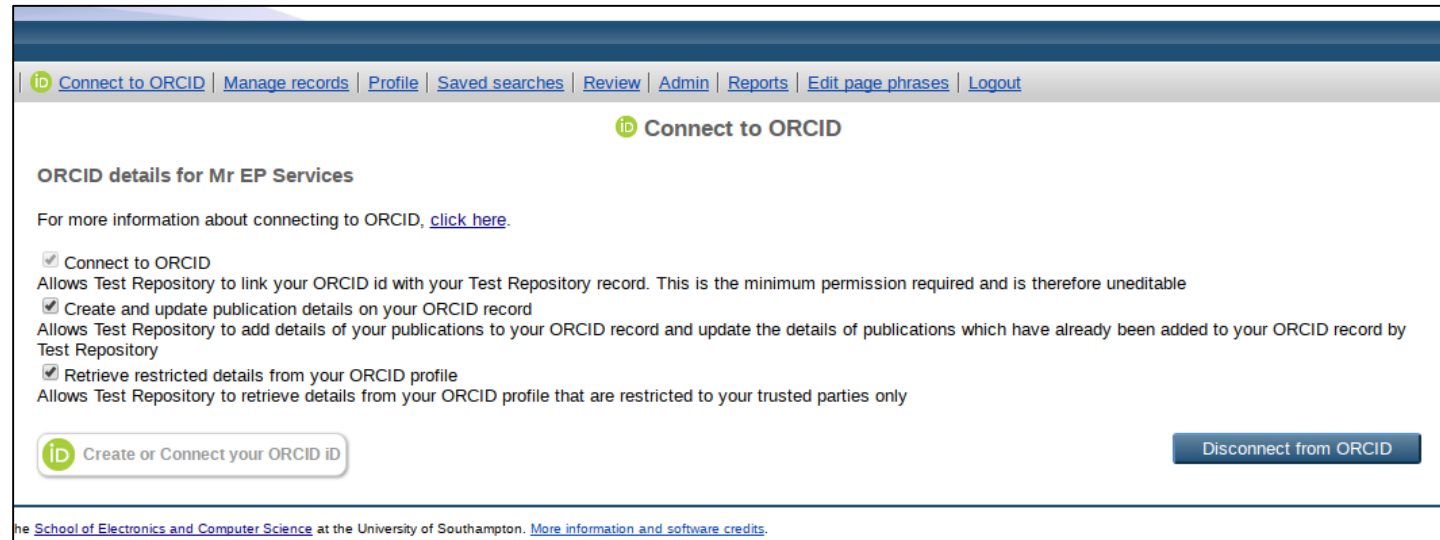
ORCID Support Advance - Connect

- 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”

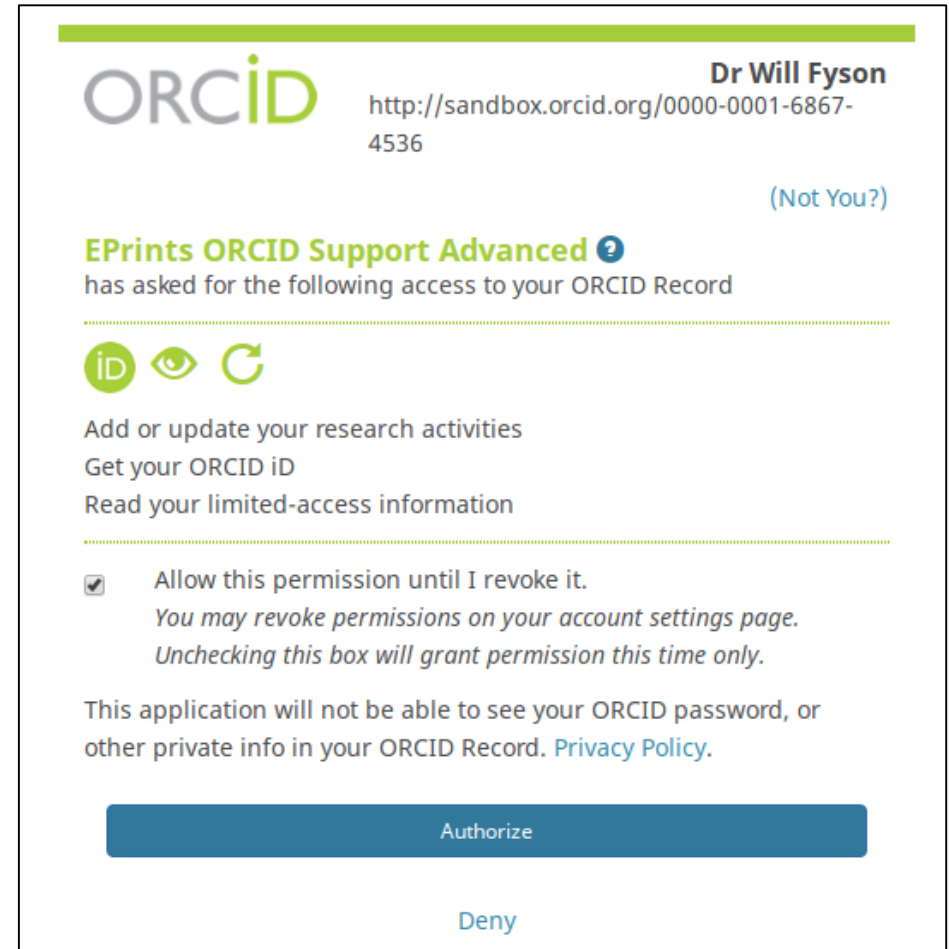
3) “Retrieve restricted details from your ORCID profile”




The screenshot shows the 'Connect to ORCID' interface. At the top, there is a navigation bar with links: [id Connect to ORCID](#), [Manage records](#), [Profile](#), [Saved searches](#), [Review](#), [Admin](#), [Reports](#), [Edit page phrases](#), and [Logout](#). Below this, the main heading is 'id Connect to ORCID'. The user is identified as 'ORCID details for Mr EP Services'. A link is provided for more information: 'For more information about connecting to ORCID, [click here](#).' Three permissions are listed, each with a checked checkbox: 'Connect to ORCID' (allows linking the ORCID ID to the Test Repository record), 'Create and update publication details on your ORCID record' (allows adding and updating publication details), and 'Retrieve restricted details from your ORCID profile' (allows retrieving restricted details for trusted parties). At the bottom left, there is a button labeled 'id Create or Connect your ORCID ID'. At the bottom right, there is a button labeled 'Disconnect from ORCID'. The footer text reads: 'The School of Electronics and Computer Science at the University of Southampton. [More information and software credits](#).'


ORCID Support Advance - Connect




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




http://sandbox.orcid.org/0000-0001-6867-4536
Dr Will Fyson

(Not You?)

EPrints ORCID Support Advanced 
 has asked for the following access to your ORCID Record

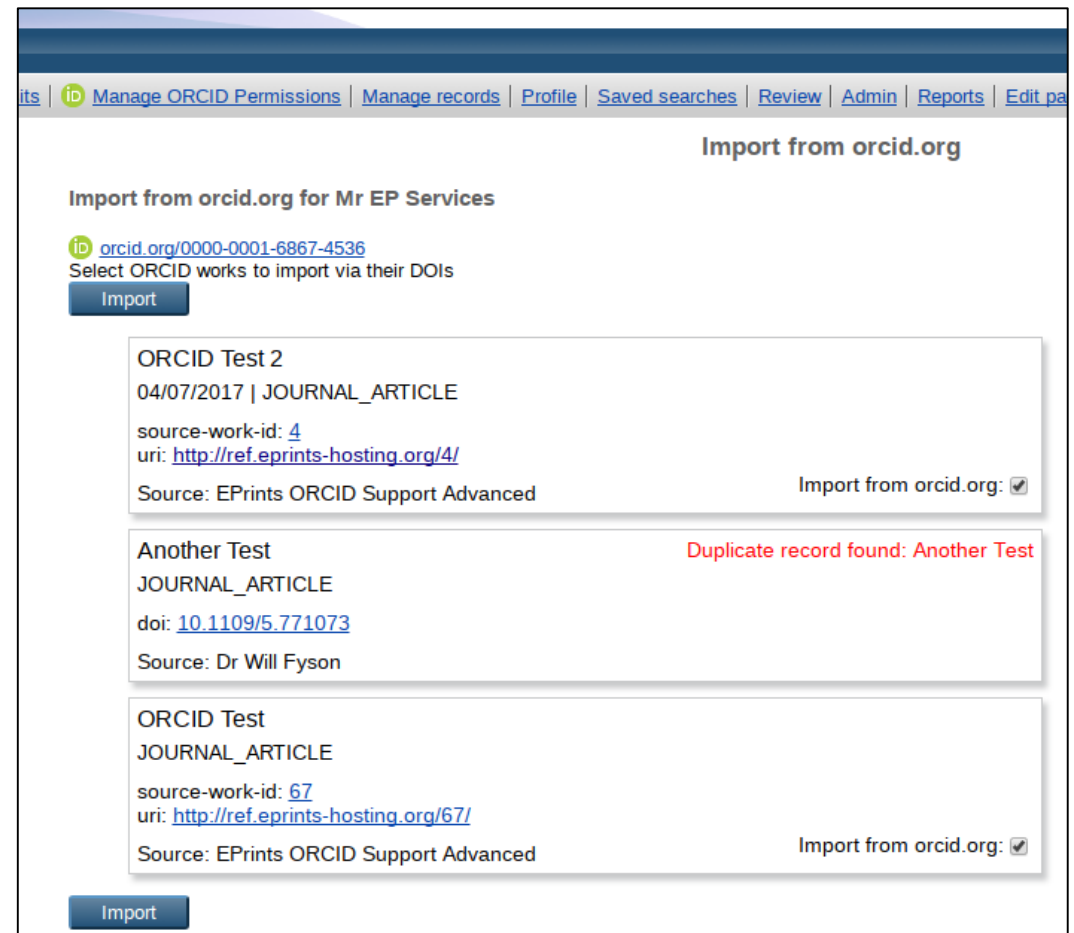
Add or update your research activities
 Get your ORCID ID
 Read your limited-access information

Allow this permission until I revoke it.
*You may revoke permissions on your account settings page.
 Unchecking this box will grant permission this time only.*

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

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’



The screenshot shows the 'Import from orcid.org' interface in the EPrints system. The page title is 'Import from orcid.org for Mr EP Services'. Below the title, there is a user ID 'orcid.org/0000-0001-6867-4536' and a prompt to 'Select ORCID works to import via their DOIs'. An 'Import' button is visible. The interface displays a list of works for import:

- ORCID Test 2**: 04/07/2017 | JOURNAL_ARTICLE. Source: EPrints ORCID Support Advanced. Import from orcid.org: .
- Another Test**: JOURNAL_ARTICLE. Source: Dr Will Fyson. A red message indicates 'Duplicate record found: Another Test'.
- ORCID Test**: JOURNAL_ARTICLE. Source: EPrints ORCID Support Advanced. Import from orcid.org: .

An 'Import' button is located at the bottom of the list.

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.



Export to orcid.org

Export to orcid.org for Mr EP Services

 orcid.org/0000-0001-6867-4536

Select records to export to your orcid.org profile

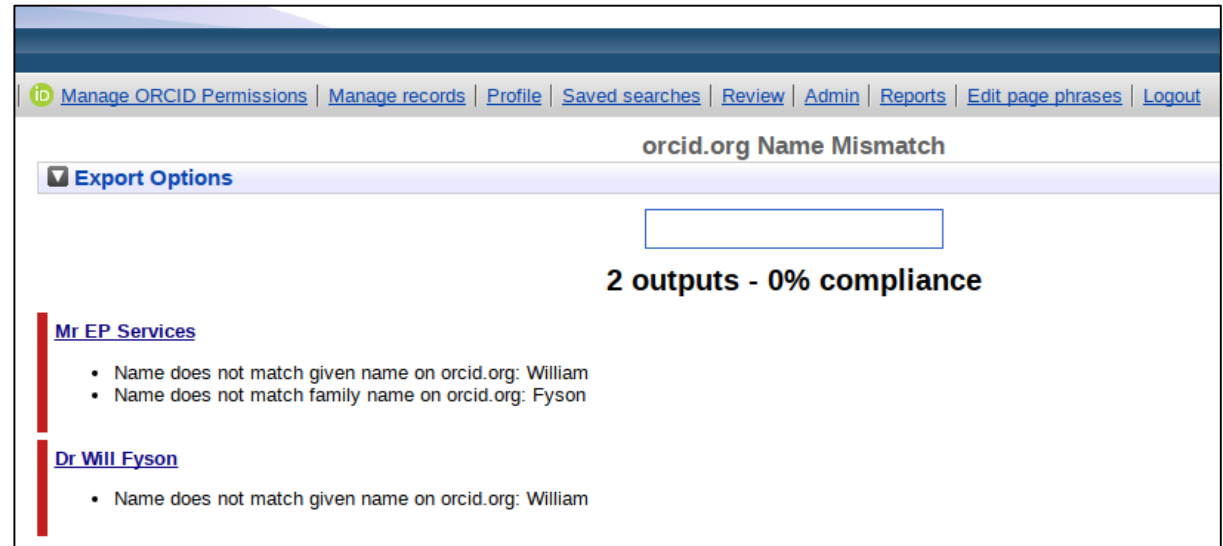
Fyson, RW  and Bradley, J  (2017) ORCID Test 2 . Journal. (In Press)	<input checked="" type="checkbox"/>
Fyson, William  and Bradley, J. ORCID Test . Journal.	<input checked="" type="checkbox"/>
Fyson, William  Lorem Ipsum . Lorem.	<input checked="" type="checkbox"/>

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.



The screenshot displays a web interface for ORCID Support Advance. At the top, there is a navigation bar with links: [id](#), [Manage ORCID Permissions](#), [Manage records](#), [Profile](#), [Saved searches](#), [Review](#), [Admin](#), [Reports](#), [Edit page phrases](#), and [Logout](#). Below this, the main heading is "orcid.org Name Mismatch". There is an "Export Options" section with a dropdown menu. A search box is present, and below it, the text "2 outputs - 0% compliance" is displayed. The report lists two users with name mismatches:

- Mr EP Services**
 - Name does not match given name on orcid.org: William
 - Name does not match family name on orcid.org: Fyson
- Dr Will Fyson**
 - Name does not match given name on orcid.org: William

Conclusions

- *ORCID Support* is required before *ORCID Support Advance* can be used.
- *ORCID Support* provides basic ORCID functionality, allowing ORCID IDs 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!