

ORCIDs & PIDs from Scratch

The Open Science Framework at Oxford
Oxford Festival of Open Scholarship 2022

March 10th 2022 – 10:00-11:00

Neil Jefferies
*Head of Innovation
Open Scholarship Support*

This session will be recorded



Slides will be made available after the session



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If you would like to tweet about this session please use: #OxFOS22



Workshop Plan

ORCIDiDs and PIDs

Neil Jefferies

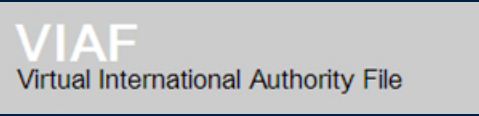
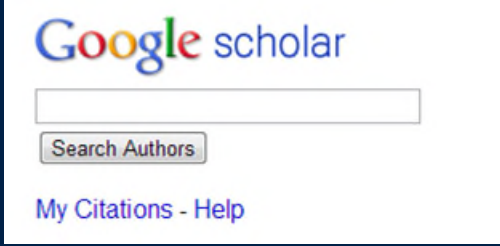
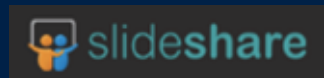
Head of Innovation, Open Scholarship Support

Workshop tasks

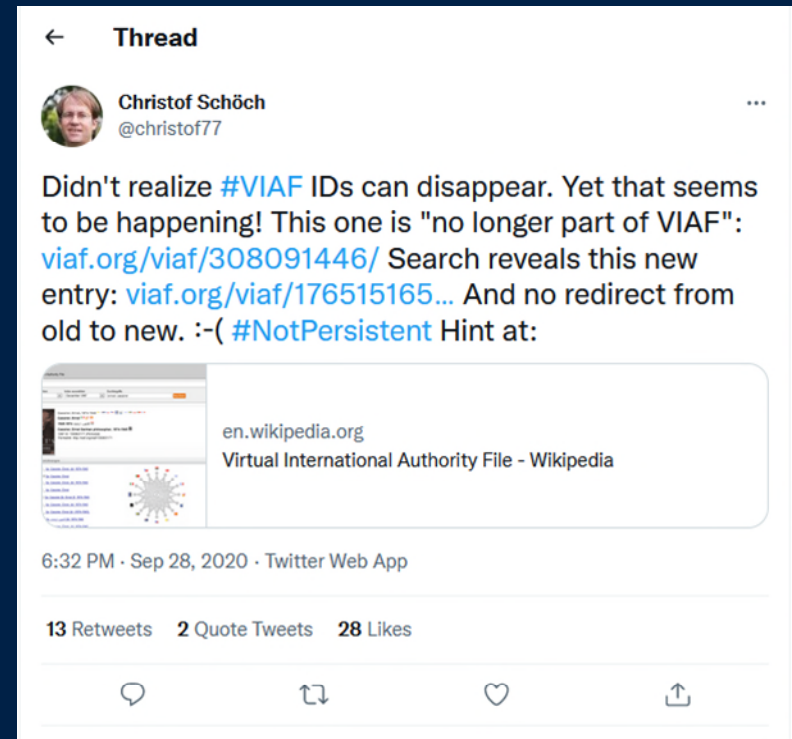
- Get your ORCID
- Link your ORCID to your Oxford SSO
- Explore your ORCID account
Your record and settings
- Update your ORCID record
Add a link or publication

Researcher identifiers & profiles

Lots of them (all incomplete)



Researchers don't control them



Open Research and Contributor Identifier ORCID

What is ORCID?



The **ORCID iD**: a unique, persistent identifier free of charge to researchers



An **ORCID record** connected to the ORCID iD



A set of **Application Programming Interfaces (APIs)** to integrate with other services

ORCID Principles (simplified)

- **Researcher control** of the content of your record, and who can access it
- **Inclusive community governance**, mostly not-for-profit stakeholders
- **Openness** of software, data and governance
- **Persistence**, institutional fees are enough to ensure sustainability
- **Free** for researchers



My ORCID Record

ORCID
Connecting research and researchers

SIGN IN/REGISTER English

Search...

id
https://orcid.org/
0000-0003-3311-3741

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

Name
Neil Jefferies

Activities Expand all

Employment (1) Sort

University of Oxford: Oxford, Oxfordshire, GB

(Bodleian Digital Library Systems and Services)
Employment Show more detail

Source: ORCID Integration at the University of Oxford

Education and qualifications (2) Sort

Funding (1) Sort

To streamline the publication workflow for data papers

2017-10-01 to 2018-10-01 | Grant
Alfred P. Sloan Foundation (New York, US)
URL: <https://app.dimensions.ai/details/grant/grant.7547951>
GRANT_NUMBER: R014 Show more detail

Scopus Integration

Oxford Integration

Sloan Foundation

Digital Preservation Environment

PASIG 2019, Mexico City
2019 | Conference paper Show more detail
DOI: [10.6084/M9.FIGSHARE.7767](https://doi.org/10.6084/M9.FIGSHARE.7767)

Source: Neil Jefferies

Sword V3 Presentation

Zenodo
2018-11-13 | Other Show more detail
DOI: [10.5281/zenodo.1486066](https://doi.org/10.5281/zenodo.1486066)
CONTRIBUTORS: Neil Jefferies

Source: DataCite

Data2Paper: Streamlining Data Paper Submission

Zenodo
2018-01-19 | Conference poster Show more detail
DOI: [10.5281/zenodo.1155343](https://doi.org/10.5281/zenodo.1155343)
CONTRIBUTORS: Neil Jefferies; Fiona Murphy; Anusha Ranganathan; Thomas Inghram; Hollydawn Murray

Source: DataCite

Contextual and Provenance Metadata in the Digital Library of the Bodleian (ORA)

Metadata and Semantics Research
2015 | Other Show more detail
DOI: [10.1007/978-3-319-24129-6_24](https://doi.org/10.1007/978-3-319-24129-6_24)
CONTRIBUTORS: Tanya Gray Jones; Lucie Burrows; Neil Jefferies; Anusha Ranganathan; Sally Rumsey

Source: Neil Jefferies via Crossref Metadata Search ★ Preferred source (of 2) Help

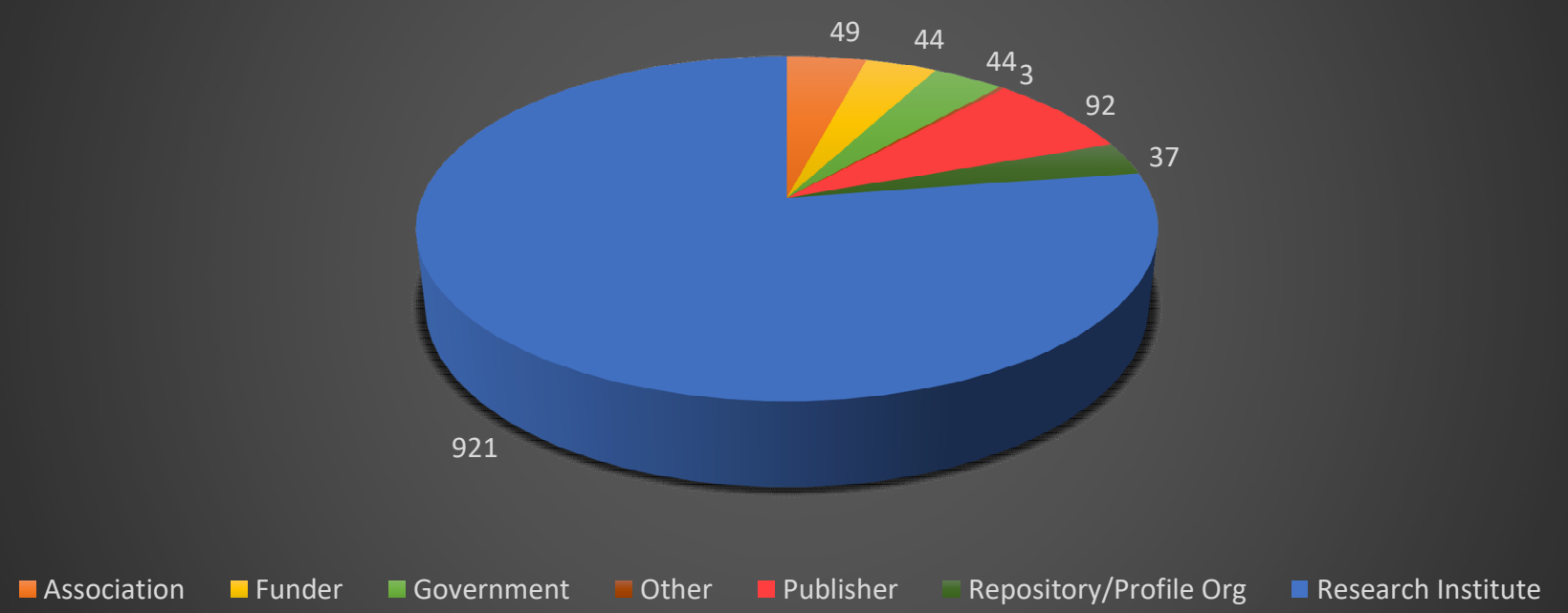
Manual Entry

Zenodo via DataCite

Book via CrossRef

ORCID Statistics

ORCID Membership (Total 1210)



Persistent Identifiers (PIDs)

Similar identification problems to those that led to the development of ORCID apply to many online digital objects that are part of the research process.

Publishers have already introduced **DOIs** (Digital Object Identifiers) for **journal articles**. Demand for improved reporting, transparency and reproducibility has led to other identifier systems emerging.

UKRI and Jisc in the UK, OpenAIRE in the EU, and others, are looking to standardise on a few...

- **DataCite DOIs** apply to digital research outputs that are not journal articles. Initially, **data sets** but also **software** and sometimes **preprints**. ORA-Data supports DataCite.
- **RAID** – Research Activity ID's for research projects and sub-projects
- Organisational identifiers such as **FundRef** for funders, and **Org ID** for legal entities, such as institutions.
- Grant identifiers
- **RRID** - Research Resource ID's for facilities and instruments

ORCID at Oxford

History

- [Jisc/ARMA ORCID pilot May 2014-15](#)
 - Looking at business case and costs of implementing ORCID
 - 8 HEI's (including Oxford) implemented ORCID in various ways
- UK Consortium created in August 2015
 - Managed by Jisc
 - Advised by UK ORCID Forum
 - 99 UK institutions (end 2020)

Benefits of Consortium

- Jisc provides first line help desk in UK time zone
- Reduced cost for members (and drops further as the consortium grows)
- Influence over ORCID developments
- Jisc funds/organises community activities – training, outreach and technical development
- Shared experiences and materials

How ORCID at Oxford works

In Oxford

- Your ORCID can be linked to your Single Sign-On ID
- If you have done this, systems that use SSO can look up your ORCID, and fill it in automatically.
- For example, this feature could be used by ORA and ORA-Data in the future.
- The University can also update your ORCID record with a validated affiliation to the University.

Elsewhere

- You can use your Oxford SSO to sign in to ORCID.
- If you use systems that accept ORCID logins (e.g. the Open Science Framework) then your SSO works for them too.
- If you have already used your SSO to access SharePoint via the Web, for example, then you should be automatically logged in to the systems above.
- If you leave Oxford, your original ORCID password will still work.

Get your ORCID

- Go to <https://orcid.org/register>
- I suggest:
 - Provide your full name – ORCID will see if you have an account you have forgotten about!
 - Use your preferred Oxford email address for your primary email
 - Provide a non-Oxford additional email address
- Press Next
 - Remember your password!
- Press Next
 - Agree to the T&C's

The image displays two sequential screenshots of the ORCID registration process.

Step 1: Personal data
 This is step 1 of 3. The form includes fields for First name (Neil), Last name (Optional) (jefferies), Primary email (An email is required), Confirm primary email (Please confirm your email), and Additional email (Optional). There is a '+ Add another email' link and 'GO BACK' and 'NEXT' buttons.

Step 2: Security and notifications
 This is step 2 of 3. The form includes a Password field, a Confirm password field, and Notification settings. The password requirements are: 8 or more characters, 1 letter or symbol, and 1 number. The notification settings include a checkbox for 'Please send me quarterly emails about new ORCID features and tips. To receive these emails, you will also need to verify your primary email address.' There are 'GO BACK' and 'NEXT' buttons.

Validate your email address

- Log in to your Oxford email (the primary email address you gave to ORCID)
- You should see an email from ORCID
 - You may need to wait a short while for it to appear
- Open the email, it should contain a validation link
 - Click on the link
- You should be taken to an ORCID page that confirms your email
 - This ensures that ORCID can contact you, for example, to reset a forgotten password

Workshop tasks

- ~~Get your ORCID~~
- Link your ORCID to your Oxford SSO
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Your record and settings
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Add a link or publication

Link your ORCID to your SSO

- Go to <http://register.it.ox.ac.uk/self/orcid>
- It should say "You do not yet have an ORCID iD associated with your Oxford account, but can link one now."
- Ensure the "Update my ORCID record..." box is ticked
- Press the "Log in to ORCID" button

You do not yet have an ORCID iD associated with your Oxford account, but can link one now. *Why would I want to do this?*

By submitting the form below you'll be redirected to the ORCID site to give permission for the University to see your ORCID iD. If you don't yet have an ORCID account you'll be able to create one before you give permission.

How do I replace a manually entered Oxford affiliation with a verified one?

- Update my ORCID record to include a University of Oxford affiliation if one doesn't already exist (*employment; Bodleian Digital Library Systems and Services*)
This will require permission to update your ORCID profile (you can remove this later).

Log in to ORCID

Self-Registration Home Page ORCID at Oxford

Link your SSO to your ORCID

- Log in to ORCID using the email address and password you set up previously
- You will be asked to authorize access for the “**ORCID Integration at the University of Oxford**”
- Press the “**Authorize access**” button
- You should be returned to the Oxford page to confirm that your ORCID has been linked, and that your validated affiliation has been added to your profile.

ORCID Authorize access

You are currently signed in as:

Neil Jefferies
<https://orcid.org/0000-0003-3311-3741>
Sign out

[ORCID Integration at University of Oxford](#)

has asked for the following your ORCID record:

Add/update your res activities (works, affi

Read your information with visibility set to Trusted Organizations

Authorize access

Deny access

If authorized, this organization will have access to your ORCID record, as outlined

Congratulations; your ORCID has successfully been linked to your Oxford account.

We were able to successfully add an Oxford affiliation to your ORCID profile. You may edit or delete this affiliation on [the ORCID website](#).

You can now [return home](#).

[Self-Registration Home Page](#) [ORCID at Oxford](#)

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Log in to ORCID with SSO

- Go to <https://orcid.org/signin>
- This time, press the “**Access through your institution**” button
- Start typing “Oxford” into the “**Organisation’s name**” box
- You should be given a choice of institutions. Select “University of Oxford” and press “**Continue**”.
- Your institution is saved in the browser, so in future you can click on “**University of Oxford**” straightway.
- You will be taken to your Oxford SSO login (since you are probably already signed in, you should go straight to ORCID)

Sign in

Email or 16-digit ORCID ID
example@email.com or 0000-0001-2345-6789

Password

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

Access through your institution

You may sign into the ORCID Registry using institutional accounts you already have, like one from your university. If you don't already have an ORCID ID, you will be prompted to create one. [Learn more about different ways to sign in to ORCID.](#)

Use a suggested selection

University of Oxford

Or enter your organization's name

Organization's name

Invalid Organization Name

[Go back](#) **CONTINUE**

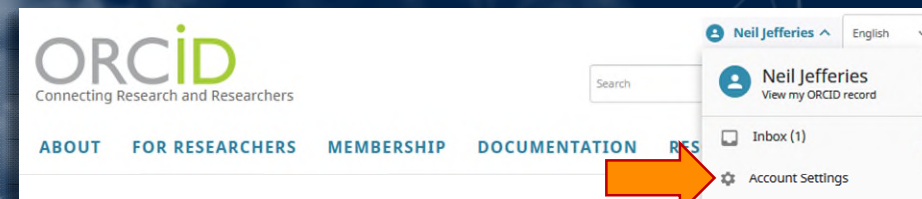
Your ORCID Record

- When you first sign in to ORCID, your ORCID Record is displayed
- ORCID is all about giving **you** control
- Everything your ORCID Record comes via a link you have made, or data you have input yourself
 - For example, under "**Employment**" you should see details from the link you have just made to Oxford
 - Scroll down to see the other things that can appear in an ORCID record
- Everything has a **Source** that indicates where it came from
- Everything has a little pencil symbol next to it, which allows you to edit that item
- Everything has either three little dots, or three symbols (arrowed). These determine who can see that item outside your account.
 - Hover your mouse cursor over the dots/symbols
 - Funders, for example, sometimes request an ORCID rather than a CV

The screenshot displays the ORCID record for Neil Jefferies. The page includes a search bar, a user profile section with the ORCID iD, and several sections for managing the record: Names, Biography, Activities, Employment, Websites & social links, Other IDs, and Keywords. The 'Employment' section is expanded, showing a record for the University of Oxford. A red arrow points to the 'Who can see this?' dropdown menu, which is currently set to 'Everyone'. Another red arrow points to the 'Show more detail' link for the University of Oxford employment record.

ORCID Account Settings

- Go to the top right of the screen, click on your name and select “**Account Settings**”
- **Email and notifications**: ORCID notifies you when something is added to your record so you can decide whether to keep it. There is a quarterly newsletter.
- **Remove duplicate record**: publishers and institutions created them for people in the early days (they shouldn’t have, really!)
- **Two factor authentication**: you will have this via Oxford SSO anyway
- **Download all my data**: in XML
- **Trusted Organisations and People**: who can do more than just view your public details. Generally, you want publishers and repositories that hold your material to update your record automatically. Oxford is there since it put in your affiliation details.



Neil Jefferies

ORCID iD

<https://orcid.org/0000-0003-3311-3741>

Account settings

- Email and notification preferences [Edit](#)
- Language display preferences [Edit](#)
- Password [Edit](#)
- Visibility preferences [Edit](#)
- Deactivate account [Deactivate this ORCID record...](#)
- Remove duplicate record [Remove duplicate record](#)
- Two-factor authentication [Edit](#)
- Download all my data [Show](#)

Trusted organizations

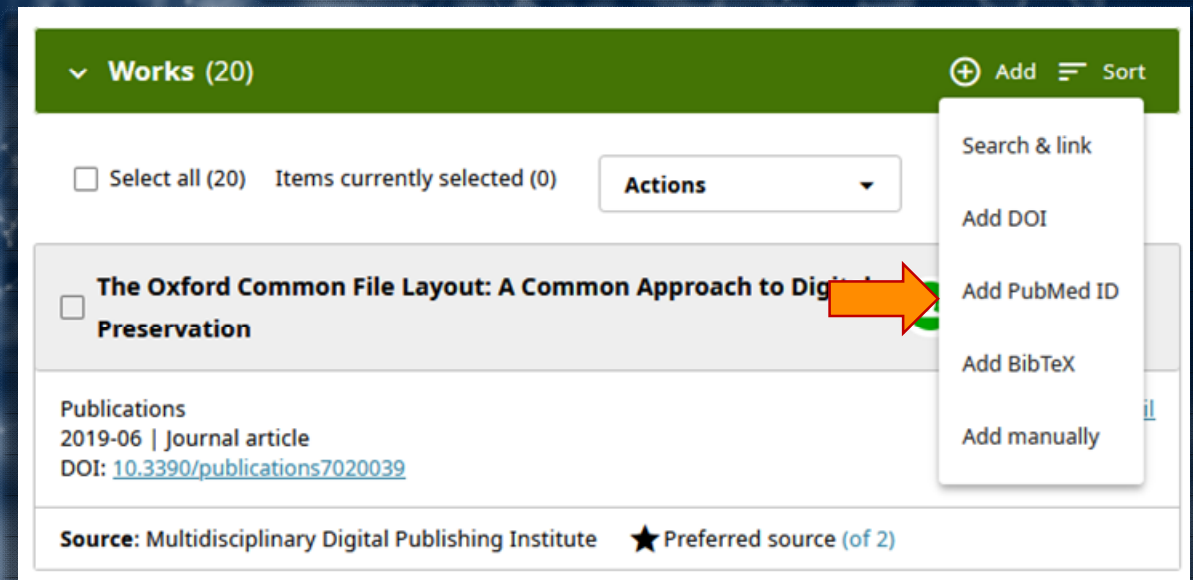
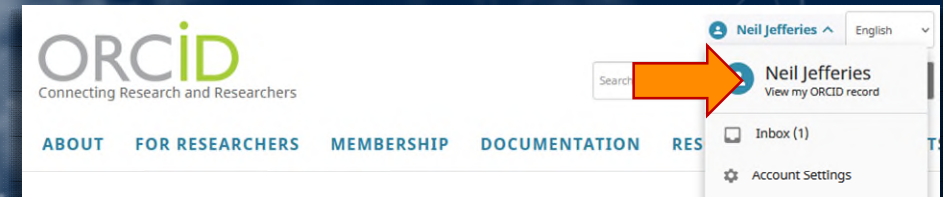
Trusted organization	Approval date	Access type
BASE - Bielefeld Academic Search Engine https://www.base-search.net	2019-10-17	Read your information with visibility set to Trusted Parties Add/update your research activities (works, affiliations, etc)

Workshop tasks

- ~~Get your ORCID~~
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- ~~Explore your ORCID account~~
Your record and settings
- Update your ORCID record
Add a link or publication

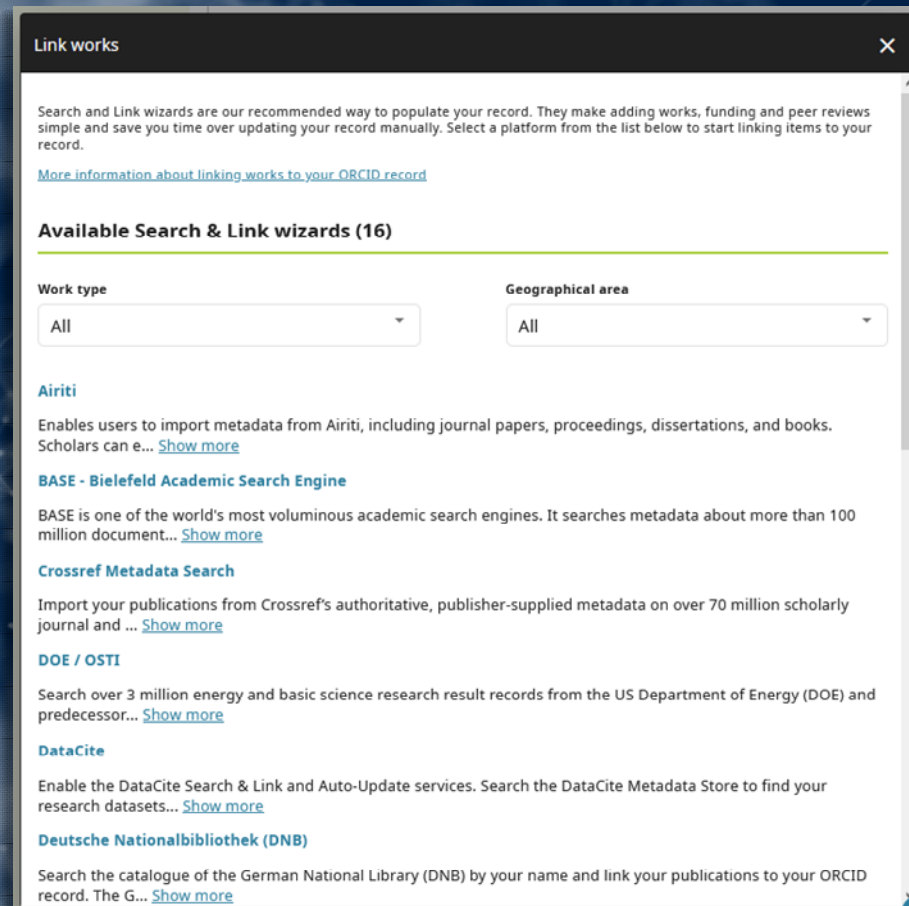
Update your ORCID Record

- Go to the top right of the screen, click on your name and select “**View my ORCID Record**”
- Published stuff is what you are most likely to be adding so scroll down to “**Works**”, and press the “**Add**” button
- The options are:
 - **Search & link** links your ORCID account to another source and pulls the metadata from there
 - Paste in a **DOI** or **PubMed ID** for something, and ORCID will try to download the details automatically
 - Paste in a **BibTeX** record for something, which you could get from **Zotero** or **EndNote**
 - Manually enter data



Linking a Source to your ORCID

- The “**Search and Link Wizards**” are very powerful but you generally need an account with the sources to link to. We’re not going to have time for this today – but have a look around after this.
- Remember, you can delete anything added to your account, including linked sources, so experimentation is fine. **You are in control.**
- Good broad sources where you are likely to be successful would be:
 - **BASE** – huge, probably your best bet if you are not sure
 - **CrossRef** – aggregates metadata from a wide range of publishers
 - **DataCite** – aggregates metadata from many data repositories but also Zenodo and Figshare (and ORA Data)



Link works

Search and Link wizards are our recommended way to populate your record. They make adding works, funding and peer reviews simple and save you time over updating your record manually. Select a platform from the list below to start linking items to your record.

[More information about linking works to your ORCID record](#)

Available Search & Link wizards (16)

Work type: All

Geographical area: All

Airiti
Enables users to import metadata from Airiti, including journal papers, proceedings, dissertations, and books. Scholars can e... [Show more](#)

BASE - Bielefeld Academic Search Engine
BASE is one of the world's most voluminous academic search engines. It searches metadata about more than 100 million document... [Show more](#)

Crossref Metadata Search
Import your publications from Crossref's authoritative, publisher-supplied metadata on over 70 million scholarly journal and ... [Show more](#)

DOE / OSTI
Search over 3 million energy and basic science research result records from the US Department of Energy (DOE) and predecessor... [Show more](#)

DataCite
Enable the DataCite Search & Link and Auto-Update services. Search the DataCite Metadata Store to find your research datasets... [Show more](#)

Deutsche Nationalbibliothek (DNB)
Search the catalogue of the German National Library (DNB) by your name and link your publications to your ORCID record. The G... [Show more](#)

Adding to your ORCID Record

- If you have used Zenodo or Figshare, then you probably have some material with a DataCite DOI.
 - Open another tab in your browser
 - Go to <https://search.datacite.org>, find an item of yours and copy the link which begins <https://doi.org/...>
 - From the "Add" menu, choose "Add DOI"
 - Paste the link into the DOI box and press the button
- Otherwise, from the "Add" menu, choose "Add manually"
- Either way you get to the metadata editing screen – sing a DOI (or BibTex, or PubMed ID) just prefills some of the fields
- Only the **Work Type** and **Title** are mandatory before you can press the "Add this work..." button. You may want to adjust the visibility, though.

The screenshot shows the DataCite Search interface. At the top, there are navigation links for Works, People, Repositories, Members, Support, and a Sign in button. A search bar contains the name "Neil Jefferies". Below the search bar, a list of works is displayed, with the first entry being "The Oxford Common File Layout" by Neil Jefferies, presented via Zenodo. The work description is "The Oxford Common File Layout (OCFL) specifies an approach to the storage of digital information that is designed to promote long-term object management." Below the work entry, there is a note: "No citations were reported. No usage information available." An orange arrow points from the text in the instructions to the "Add DOI" button in the modal form.

The modal form, titled "Works - Add work from DOI", contains the following fields:

- Work type***: A dropdown menu with "Journal article" selected.
- Title***: A text input field containing "The Oxford Common File Layout".
- Add translated title**: A button with a plus icon.
- Work Subtitle**: A text input field.
- Journal title**: A text input field containing "Zenodo".
- Publication date**: Three dropdown menus for year, month, and day, showing "2019", "04", and "04".
- Link**: A text input field containing "https://zenodo.org/record/2642296".

At the bottom of the modal, there are two buttons: "Add this work to your ORCID record" and "Cancel". On the right side of the modal, there is a sidebar with tabs for "Work details", "Identifiers", "Citation", "Other information", and "Visibility".

Thank you – Any Questions?

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