ORCID US Community: Supporting Researchers & Adding Value for Research Institutions

- Sheila Rabun [iD](https://orcid.org/0000-0002-1196-6279) ORCID US Community Specialist, LYRASIS
- Karen Estlund [iD](https://orcid.org/0000-0001-6536-9480) Associate Dean for Technology & Digital Strategies, Penn State University
- Jason Ronallo [iD](https://orcid.org/0000-0002-6080-7549) Head of Digital Library Initiatives, North Carolina State University
- Carmelita Pickett [iD](http://orcid.org/0000-0001-9637-2359) Associate University Librarian for Scholarly Resources and Content Strategy, University of Virginia
Agenda

• ORCID overview
• ORCID US Community
• Case Studies:
  • Penn State University
  • North Carolina State University
  • University of Virginia
• Discussion & Questions
https://orcid.org/0000-0002-1196-6279

Sheila Rabun

ORCID ID
https://orcid.org/0000-0002-1196-6279

Also known as
S.J. Rabun

Country
United States

Email
sheila.rabun@lyrasis.org

Employment (6)

Lyrisat: Atlanta, GA
2018-05-01 to present | ORCID US Community Specialist (Licensing and Strategic Partnerships)
Employment
Source: Sheila Rabun

Education and qualifications (4)

University of Washington Information School: Seattle, WA
2016-08 to present | Masters in Library and Information Science
Education
Source: Sheila Rabun

Works (17 of 17)

ORCID for System Interoperability in Scholarly Communication Workflows
ACRL Tech Connect
2018-12-18 | newsletter-article
Source: Sheila Rabun

Funding (0)
ORCID: Global Picture

ORCID BY THE NUMBERS

- 6m+ ORCID iDs
- 1000+ Members
- 590+ Integrations

Legend
- National ORCID Consortium
- ORCID member

lyrasis.org
ORCID US Community Map

112+ institutional members
ORCID US Community

- Formed in January 2018
- National partnership for premium ORCID membership
- Any non-profit research institution can join as a member
- LYRASIS as lead
ORCID Benefits for Research Institutions

- **Mitigate** confusion caused by name ambiguity
- **Assess** individual contributions & measure institutional impact
- **Assert** trustworthy & accurate affiliations
- **Save** time & reduce administrative burden
ORCID Trends at US Research Institutions

- Integration with **central ID, profiling & research information** systems (many vendors)
- Custom API integrations →
  - **Reading** data from ORCID records
  - **Writing** data to ORCID records
- Using ORCID to **meet** reporting **requirements**
- Shared challenges:
  - Prioritizing ORCID integration
  - Encouraging faculty and students to **use** ORCID
ORCID @ Penn State University
Assess Contributions & Measure Impact

Scientific migrations: a view from ORCID

Although the data set overrepresents some EU countries and underrepresents China, analysis reveals intriguing migration patterns. For example, about a third of those who earned their Ph.D. in the United Kingdom were living in another country by 2018. But only about 15% of Ph.D.s from other EU nations migrated away. Hover over the interactive chord diagram to see migration flow between regions.

ORCID at Penn State

ORCID: Managing Your Identity

ORCID provides a persistent digital identifier that distinguishes you from every other researcher.

What is ORCID?

ORCID provides a persistent digital identifier that distinguishes you from every other researcher. This means that it will be less likely that your name will be confused with another researcher with a similar name, ensuring that you get the credit you deserve for your work. Unlike your work email or identification number, your ORCID ID follows you when you move. You can include your ORCID identifier on your publications, grants and even your web page. You can also link your ORCID ID to other services such as LinkedIn and Researcher ID.

How Do I Get Started?

If you already have an ORCID ID you can link it to your PSU log-in using the steps below. If you don’t have an ORCID ID you can follow the steps below as well, but there will be one extra step.

1. Visit http://orcid.identity.psu.edu

2. Login to PSU WebAccess if you are not already (Two Factor Authentication if required)
Linking ORCID to Institutional ID

Sign into ORCID or Register now

Personal account  Institutional account

Sign in with an institutional account

Enter your organization's name

Penn State

Continue

Allow me to pick from a list
YOU ARE LINKED!

Thanks for cross-linking your Penn State Access ID and your ORCID ID! You can manage this link by visiting the ORCID website and accessing your account settings. If you don’t see Penn State University below the Trusted Organizations section in your account settings on the ORCID website, try cross-linking again.

Name: Karen Estlund
Penn State Access ID: kme20
ORCID ID: https://orcid.org/0000-0001-6536-9480
### Alternate sign in accounts

<table>
<thead>
<tr>
<th>Alternate sign in ID</th>
<th>Identity provider</th>
<th>Access granted</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Penn State</td>
<td>2016-10-24</td>
</tr>
<tr>
<td></td>
<td>University of Oregon</td>
<td>2019-03-21</td>
</tr>
</tbody>
</table>
Vasant Gajanan Honavar, PhD
Professor and Edward Frymoyer Chair of Information Sciences and Technology, College of Information Sciences and Technology
Huck Institutes of the Life Sciences
Penn State Clinical and Translational Science Institute (CTSI)
Penn State Cancer Institute
Cancer Institute, Cancer Control
https://orcid.org/0000-0001-5399-3489

https://pennstate.pure.elsevier.com/
Pure writes to ORCID

Create or link an ORCID ID and perform a one-off content export only

1. Open your Personal overview workspace.

2. In the top area of the workspace, click Edit profile...

   The Person editor window is opened with your current information.

3. On the Metadata tab in the Personal Identification section, select Create or Connect your ORCID ID.

4. In the Connect with your ORCID ID dialog, click Proceed.

   Note Depending on your institution’s settings, you are presented with a list of information that Pure will share with ORCID. If you do not consent to Pure exporting this information in one-off fashion, click Cancel.

You are directed to the ORCID authorization screen.

5. If your institution exports content to ORCID and you want to prevent future exports, deselect the Allow this permission until I revoke it checkbox. Content will be exported this one time only; you will need to repeat this process to export content in the future.

6. If you already have an ORCID ID, enter your login details and click Authorize to return to Pure.
Administrator Options

Export to ORCID

Enable export of Pure content to ORCID

Select whether or not to allow Personal Users to choose to export Pure content to ORCID. Content that will be synchronised includes: Research outputs (Published / ePublished ahead of print + Publicly visible + workflow state as configured below); Affiliation details (institution + country + city, as per configuration below); Other IDs (OrCID author ID, Researcher ID, Digital Author ID, and the Pure Portal URL of selected below).

Export content to ORCID

On/Off

Send Pure Portal URLs to ORCID

On/Off

Effective workflow step

Created

Affiliations

The export to ORCID will include basic institutional information for each researcher

Root organisation
Digital Measures
A web analytics approach for appraising electronic resources in academic libraries
Wiley
3 Total Authors Coughlin, Dan; Campbell, Mark; Jansen, Bernard
March, 2016
Value Added

Melancholia i at en.wikipedia [Public domain]
Assess Contributions & Measure Impact

International University Collaboration with Australian Universities

Source Units:
- Australian Access Federation
- RGC5
- 48
- University
- A.C. Camargo Cancer Centre
- A.P. Karpinsky Russian Research Centre
- Aalborg University
- Aalto University
- Aarhus University
- Abbott Laboratories
- Abdus Salam International Centre for Theoretical Physics
- Aberystwyth University
- Abo Akademi University
- Academic Center for Dentistry Amsterdam
- Academy of Athens
- Academy of Military Medicine
- Acadia University

Support Needed for Vended Systems

Staffing

Lobbying

https://openclipart.org/detail/35563/abstract-people

https://openclipart.org/detail/297965/handshake-green
Road Map
Dashboards with Labor

KerryAnn O’Meara, professor of higher education and an associate dean at the University of Maryland at College Park

ORCID @ North Carolina State University
ORCID at NC State University Libraries

https://ronallo.com/presentations/orcid-cni-2019

Press "p" to see speaker notes.
History

- Harvesting citations of works of NC State University affiliated people for 10+ years.
- Libraries provides an API of these citations which are included on college and department faculty profile pages (WordPress).
Amanda Padbury
Executive Assistant to the Dean
College of Textiles 3421A
919-515-6500
ahholbro@ncsu.edu

Melissa Pasquinelli
Associate Department Head,
Director of Graduate Programs, and
Professor, TECS
Polymer and Color Chemistry
Textile Engineering
Textile Engineering, Chemistry and
Science
College of Textiles 3269
919-515-9426
mpasqui@ncsu.edu
Website

AREAS OF EXPERTISE
> Educational Innovation
> Fiber Science
> Medical Textiles
> Nanotechnology
> Polymer Science
> Protective Textiles
> Standards and Modeling
Melissa Pasquinelli
Associate Department Head,
Director of Graduate Programs, and
Professor, TECS

POLYMER AND COLOR CHEMISTRY
TEXTILE ENGINEERING
TEXTILE ENGINEERING, CHEMISTRY AND SCIENCE

Office: College of Textiles 3269
Phone: 919-515-9426
Email: mpasqui@ncsu.edu

Google Scholar: View Profile
Website: go.ncsu.edu/pasquinelli-lab

College of Textiles Directory
PUBLICATIONS

Photodegradation of copolyester films: A mechanistic study

Communication: Molecular-level description of constrained chain topologies in multiblock copolymer gel networks

Microphase-Separated Morphologies and Molecular Network Topologies in Multiblock Copolymer Gels
Combined experimental and computational study of process-property relationships for bioabsorbable polymers

Flame retardants: New approaches to reduce exposure

Hierarchical multi-component nanofiber separators for lithium polysulfide capture in lithium-sulfur batteries: An experimental and molecular modeling study
Photodegradation of copolyester films: A mechanistic study

*Journal of Applied Polymer Science, 10, 47148.*


[10.1002/app.47148](https://doi.org/10.1002/app.47148)
Citation Index

https://ci.lib.ncsu.edu
Colleges with Libraries-sourced Publications on Directory Pages

- WordPress plugin developed by Engineering IT (ITECS).
- Example directory pages:
  - Wilson College of Textiles
  - College of Engineering
  - College of Agricultural and Life Sciences
  - College of Natural Resources
Targeted Outreach

- Who will be the most receptive users?
- Who can we show the most immediate benefit?
- Can we build some examples of groups which have a high adoption rate?
Department meetings
Sign Up First

Connect ORCID iD with Unity ID

https://ronallo.com/presentations/orcid-cni-2019
ORCID: The number that every researcher needs

The Open Researcher and Contributor identifier—or ORCID®—is a unique, 16-digit number that:

- connects researchers to their research output;
- allows others to access and share that body of work;
- streamlines publication submission;
- eliminates name ambiguity; and
- works across different types of outputs, disciplines, and institutions.

Over 5 million researchers worldwide have an ORCID iD—you should too!

WHY REGISTER WITH ORCID?

ORCID saves you time: When you publish using your ORCID iD, your ORCID record can be automatically updated from trusted sources. Biosketch profile systems for funding agencies like SciENcv integrate with ORCID to make it quicker and easier to enter correct citations.

Showcase your research activities: You can also list your funding, data sets, software, patents, and more in your ORCID record.


ORCID for funding organizations: The NIH and other funding sources have developed policies for the use of ORCID.

1. Get started at ci.lib.ncsu.edu
2. Connect or create your ORCID iD during the sign up process.
3. Take advantage of services to enhance your profile and save you time. (See side 2 of this sheet for more information.)
LINK YOUR ORCID PROFILE WITH YOUR UNITY ID

- Visit the NC State University Libraries Citation Index at ci.lib.ncsu.edu
- Follow instructions to create your link.
- Access Libraries services... it’s that easy!

NC STATE UNIVERSITY LIBRARIES ORCID SERVICES

- Send us your CV to update your Citation Index profile.
- We will enrich your citations by searching for DOIs and open access copies.
- Your publications listings on some college and department faculty directory pages will automatically update.
- Receive hands-on support for getting your publications into ORCID and maintaining your profile.
- Invite us to a faculty meeting to present on ORCID and help get everyone signed up.
- Sign up to be notified of more services coming soon!

Contact the Libraries for support at group-lib-citations@ncsu.edu

“Now, every time I have a new publication, my ORCID profile is updated automatically... It’s magic!”

—Katharina Stapelmann, Nuclear Engineering

ORCID membership is brought to you by the NC State University Libraries in partnership with the Office of Research and Innovation.
Libraries Services

- Updated citations on department profile pages.
- Help filling in gaps to make the list of works more complete.
- Help bootstrapping the works section of ORCID records.
- Continue to harvest from Web of Science.
- Harvest works from ORCID.
Challenge: Data Entry
CV Service

Send us your CV
we'll take it from there

https://ronallo.com/presentations/orcid-cni-2019
Gap Filling
Grey Literature
Local Value Adds

https://ronallo.com/presentations/orcid-cni-2019
DOI Finding Service

Article from 1667 with a DOI:
https://doi.org/10.1098/rstl.1665.0001
External immunity in ant societies: Sociality and colony size do not predict investment in antimicrobials

Royal Society Open Science, 5(2).

https://ci.lib.ncsu.edu/profiles/rrdunn

https://ronallo.com/presentations/orcid-cni-2019
Libraries Services with Less Immediate Benefits

https://ronallo.com/presentations/orcid-cni-2019
Change the Adoption Curve
Save the Time of the Researcher
Citation Data is Messy
Delegate access to ORCID

1. Turn on Crossref and DataCite auto-updates.
2. Add works with DOIs to ORCID via Crossref Metadata Search.
Register Your ORCID iD to Unlock Services

https://ronallo.com/presentations/orcid-cni-2019
Citation Index Dashboard

Next Steps

⭐⭐ Send us your CV
Upload your CV to this form. We will add your citations to your Citation Index profile which displays on some faculty profile pages. We will enhance your citations by adding DOIs when available. Delegate access to ORCID and we will add your citations with DOIs to your profile.

Get started ⬤

⭐ Turn on Auto-Updates
With ORCID Search & Link you can quickly find publications from verified sources and have your profile automatically updated when you publish using your ORCID.

Learn how ⬤
Targeted Service Scoping
After Scoping In, Scaling Up
Scoping to Scale

- Start with the past N years. Then backlog later.
- Start with journal articles, books, and chapters before types of works less likely to have DOIs.
Faculty Appreciation

As always, thanks for making me look good!

Thanks for the update and for providing this excellent service to faculty and staff at NCSU!
Goals

- Add smart automation of pushing citations to ORCID.
- Reach every department.
- Expand outreach to graduate students.
- Reach out to those who have signed up but not taken advantage of our services.
- Expand involvement of ORCID partners like the Office of Research and Innovation (ORCID membership partners).
- Expand our IT and administration network. *Trend in new roles? Technical librarians liaise and increasingly collaborate with their technical and administrative counterparts in units across campus.*
Bonus Trick

Make that red box go away!

Is this your profile?

Claim your Citation Index profile in order to display more information about you and gain access to Libraries services. Just create or connect your ORCID iD.

Create or connect your ORCID iD

Works 3

Employment

Education

https://ronallo.com/presentations/orcid-cni-2019
Questions

- At your institution how can you do advocacy and outreach backed by services faculty want? What services can they unlock?
- How have you scoped services and outreach in order to learn more and give yourself a chance to scale up? What experiments have you done?
- What scoping mechanisms do you have in place to help learn about the challenges as you scale? How do you operationalize those decisions?
ORCID @ University of Virginia
University of Virginia & ORCID (Lyrasis, since 2014)

Challenges:
● no open access mandate
● no centralized graduate school
● multiple faculty annual reporting systems

Responses:
● ORCID integration with Libra Institutional Repository (in place)
● UVA-ORCID Connector (in development)
● Outreach
UVA Library ORCID Activities: Past & Current

Past:
● Institutional member since 2014
● Create and Connect In Libra IR since 2016

Current:
● UVA-ORCID Connector page to self-register/add UVA affiliation to researchers’ existing ORCID
● Grant obtained to create/purchase outreach materials
● Seeking opportunities to embed ORCID in multiple existing faculty-specific tools
● Recruiting IR users as pilot group for Connector portal
Upcoming: Enhance ORCID Infrastructure at UVA

Short-term (Spring 2019)

- LibGuide “Establishing & Maintaining Researcher Profiles”
- Infographic “Commonly-used Researcher Profiles: Benefits & Drawbacks” (resource for key allies)
- Expend grant funding for outreach materials
- ORCID in Aperio (UVA’s Ubiquity open publishing system)
Upcoming: Recruit Key Allies & Boost Awareness

Medium-term (Spring-Summer 2019)

- Engage key library teams: Research Data Services, Scholars’ Lab, Liaisons
- Engage Academic Program Directors, Department Heads
- Engage Key University Administrators
- Seek inclusion in Faculty Handbook
3385 IDs w/UVA emails
213 IR depositor IDs
85 authenticated UVA ORCID IDs
Libra Institutional Repository Implementation

ORCID’s Collect & Connect program, Samvera-style

- An external “microservice” handles creation and connection of UVA-Libra ORCID iDs.
- Opt-in process; not a repository requirement (slow grow)
- Permissions granted:
  - Add/update your research activities (works, affiliations, etc)
  - Read your information with visibility set to Trusted Parties

University of Virginia Library

ORCID
Member Organization
Identity & Discoverability Services Across Repositories

For disambiguation and visibility

- ORCID for authors
- DOI for works

across multiple repository instances

- LibraETD (Samvera externally-mediated student scholarship)
- LibraOpen (Samvera self-deposit, non-mediated works)
- Non-Samvera instances

link independent, local microservices...

to international, standards-based identifier services
My Dashboard

+ Create Work

My Works

<table>
<thead>
<tr>
<th>Title</th>
<th>Date Uploaded</th>
<th>ORCID Status</th>
<th>Visibility</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connecting Persistent Identifiers is a Good Thing</td>
<td>2017-11-03</td>
<td></td>
<td>Private</td>
<td>Select an action</td>
</tr>
<tr>
<td>I am the only Ellen Catz Ramsey</td>
<td>2017-11-01</td>
<td></td>
<td>Private</td>
<td>Select an action</td>
</tr>
</tbody>
</table>
University of Virginia has asked for the following access to your ORCID Record:

- Add/update your research activities (works, affiliations, etc)
- Read your information with visibility set to Trusted Parties

This application will not be able to see your ORCID password or any other information in your ORCID record with visibility set to Only me. You can manage permission granted to this and other Trusted Organizations in your account settings.

Authorize

Deny
Identity & Discoverability Services Across Repositories

Authors:
Walker, Nestor, University of Virginia Library
University of Virginia orcid.org/0000-0001-5695-0521
Ramsey, Ellen, University of Virginia Library
University of Virginia orcid.org/0000-0003-4520-4923
Lake, Sherry, University of Virginia Library
University of Virginia orcid.org/0000-0002-5660-2970
Goldstein, David, University of Virginia Library
University of Virginia orcid.org/0000-0002-0566-4186

Abstract:
For disambiguation and visibility of authors and works...across multiple repository instances,
ORCID for authors
DOI for works
LibraETD (Samvera externally-mediated student scholarship)
LibraOpen (Samvera self-deposit, non-mediated works)
Non-Samvera instances (Dataverse, Ubiquity, institutional effort reporting)
link independent, local microservices to international, standards-based identifier services.

Keywords:
UVA Library ORCID Activities

Now:
● UVA-ORCID Connector about to launch
● Grant to create, purchase ORCID outreach materials.
● Recruit IR users as pilot group for Connector portal
UVA-ORCID Connector Workflow

1. **UVA-ORCID page**
   - Check UVA ORCID status
     - UVA login (shibboleth)

2. **Create: ORCID.org register**
   - Store token & other info
   - No ORCID?
     - Have ORCID?

3. **Connect: ORCID.org signin**
   - Store token & other info
   - Display

4. **UVA registered ORCID**
   - Virgo Disc Layer
   - Libra Inst Repo
   - Display
   - Elements, etc. for Proc Reporting
University of Virginia has asked for the following access to your ORCID Record:

- Add/update your research activities (works, affiliations, etc)
- Read your information with visibility set to Trusted Parties

This application will not be able to see your ORCID password or any other information in your ORCID record with visibility set to Only me. You can manage permission granted to this and other Trusted Organizations in your account settings.

Authorize

Deny
Upcoming: Provide Support and Cement Adoption

Long-term (Summer-Fall 2019)

- Media Campaign, University-wide communication channels: UVA newspapers, web & poster campaigns
- Academic Departments and UVA-related Organizations
- New Hires and New Student events: Orientations, Student Forums, etc.
- Additional outreach activities as resources allow
Questions?

Carmelita Pickett
AUL, Scholarly Resources & Content Strategy
cpickett@virginia.edu

Ellen Ramsey
Director, Scholarly Repository Services
ellen@virginia.edu
Questions?

Web  orcid-us.org
Email  orcidus@lyrasis.org

Thank you!