HOW TO MEET COLLECT AND CONNECT

SUNET MEMBERS| 27 SEPTEMBER 2017

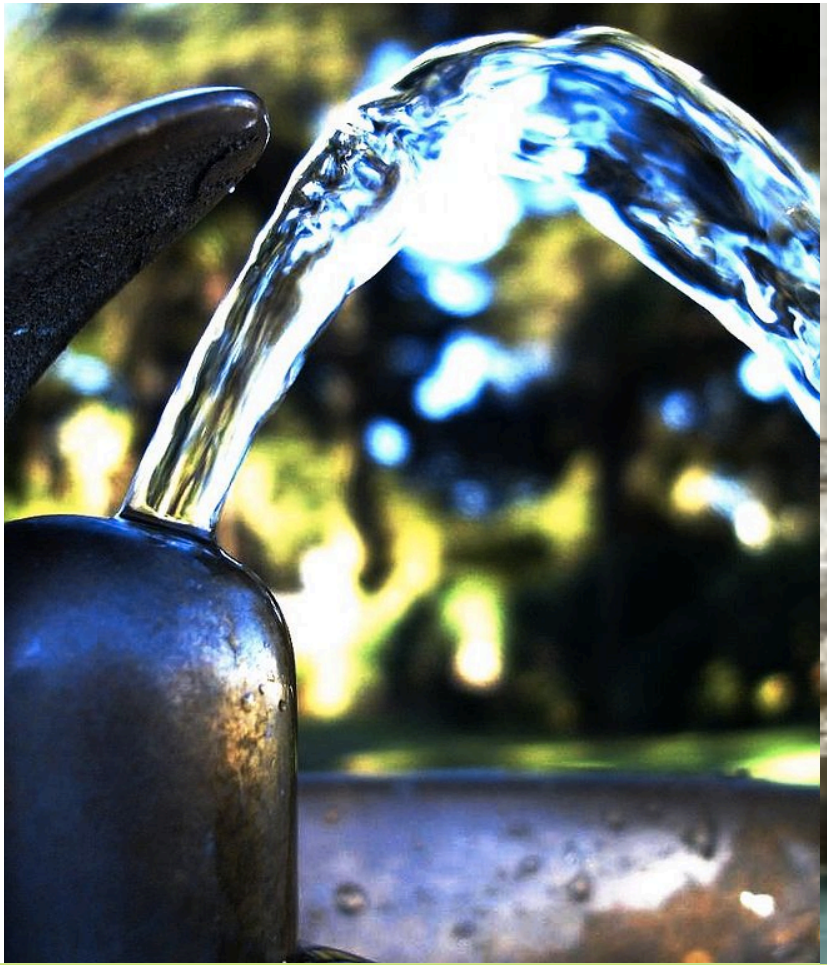
PAULA DEMAIN

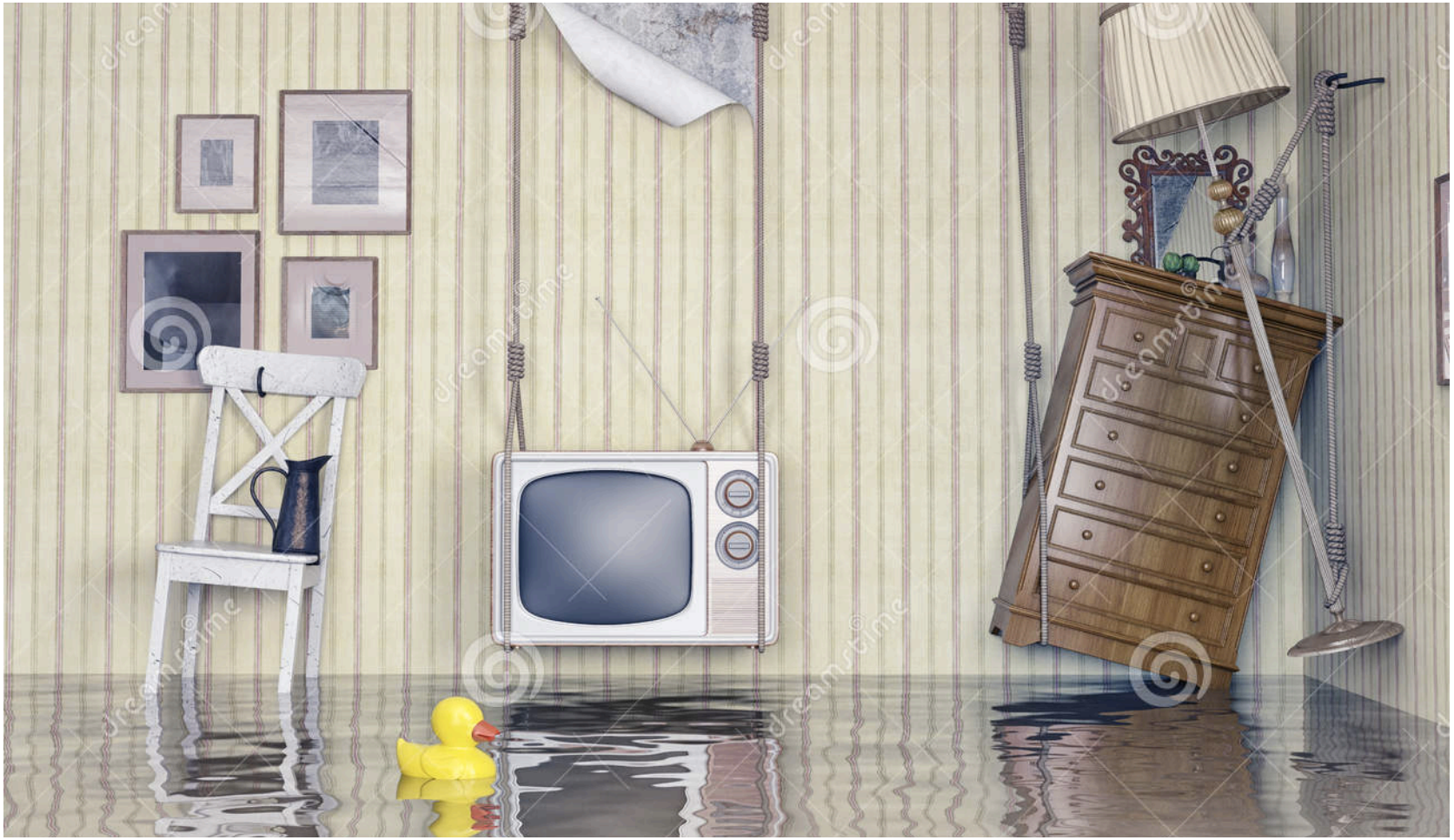
COLLECT AND CONNECT!

With hundreds of our members globally building ORCID identifiers into their systems, as well as some funders and publishers now requiring ORCID iDs, researchers are increasingly likely to encounter ORCID in their day-to-day life. We developed the Collect and Connect program to streamline the integration process and foster a shared user experience. This ensures researchers and our members understand what ORCID is and why and how to engage.

http://orcid.org/content/collect-connect

ORCID IS PART OF THE PLUMBING



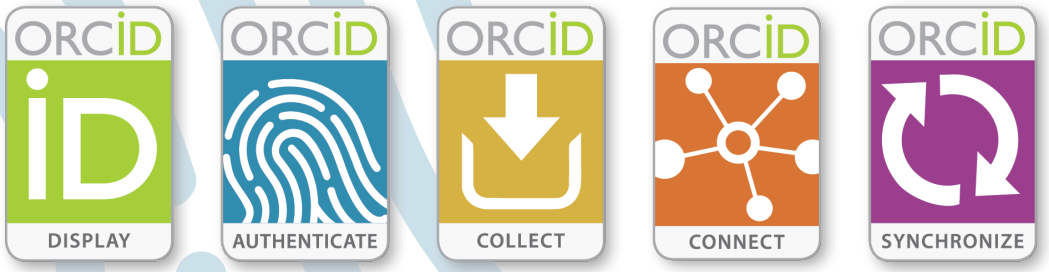


COLLECT & CONNECT GOALS

- **Clarify** goals and expectations across sectors
- **Standardize and improve** the user experience
- **Build** understanding and trust in connections between ORCID and other identifiers
- **Increase** efficiency and quality of integrations
- **Achieve** the ORCID vision through a community approach

EVERYONE LOVES A BADGE

COLLECT & CONNECT ELEMENTS



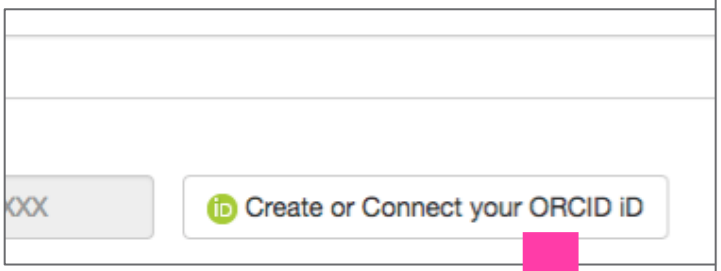
	Public API	Member API
COLLECT authenticated iDs		
DISPLAY iDs you've collected in your system		
CONNECT get data from ORCID + add affiliations/ contributions	X	
SYNCHRONIZE add data to/get data from ORCID on an ongoing basis	X	

COLLECT!

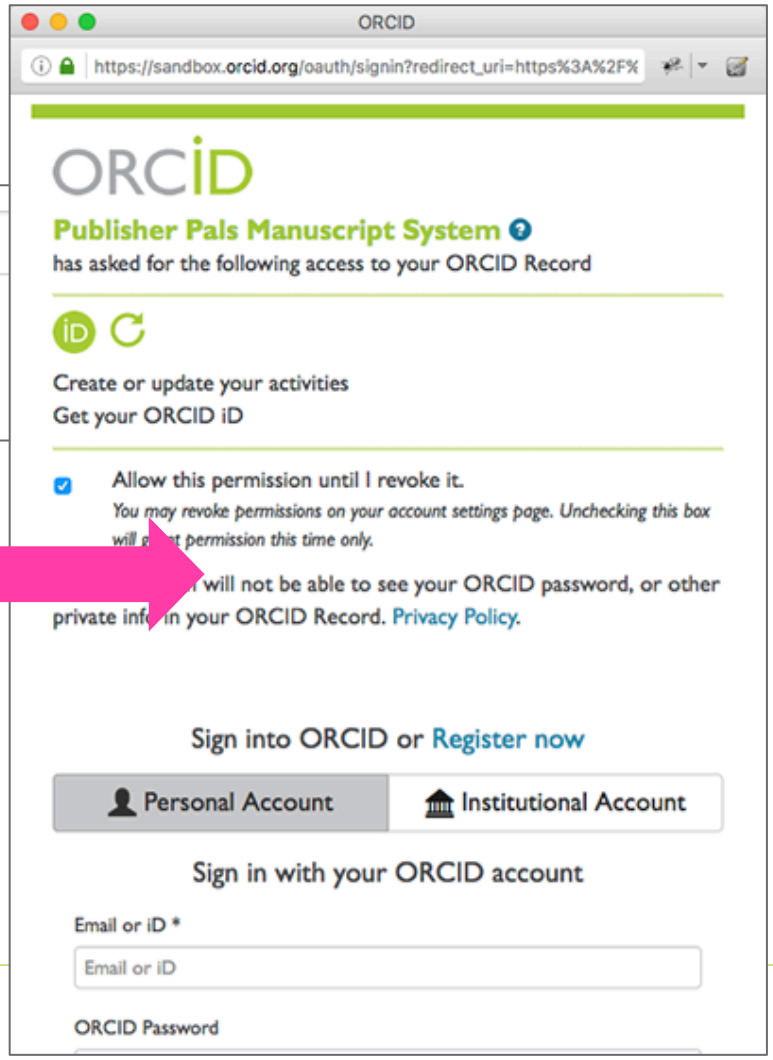
- Collect and store **authenticated** iDs
- Provide an **ORCID-branded** button for collecting iDs
- Explain **benefits** of having an iD for your researchers
- Explain **benefits** of including ORCID iDs at your site

COLLECT authenticated iDs

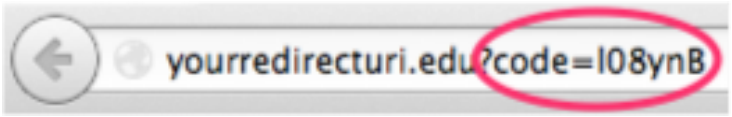
It all starts here!



User clicks a link/button on your site, then signs into ORCID (or creates new account) and grants permissions to the scopes requested



COLLECT authenticated iDs



We send the user back to a page on your site, with an authorization code added to the URL

Your system exchanges that code for an access token + user's ORCID iD

```
{"access_token":"0a3ac65f-f8a7-4257-b605-
aff0ab37d464","token_type":"bearer","refresh_token":"16d75d
2d-bb75-4087-8a01-685e5f03faf8","expires_in":
631138518,"scope":"/orcid-profile/read-
limited","orcid":"0000-0003-4153-0078"}
```

COLLECT authenticated iDs

Store iDs and Access Tokens in your system - you'll need these to **DISPLAY**, **CONNECT** and **SYNCHRONIZE** (ie: get data from or add data to ORCID)

DISPLAY!

- Store and publicly display iDs including **provenance**
- Display the ORCID iD with the iD icon, **following ORCID guidelines**
- **Use the member logo** when describing your organization's connection with ORCID
- **Explain** why you collect iDs

DISPLAY

Now that you have iDs stored in your system, display is easy:

https://orcid.org/0000-0001-6622-4910

No API request or Access Token needed - just follow our [display guidelines]

CONNECT!

- Request permissions to **write to/update** the user's ORCID record to **assert** affiliation, works, etc OR
- Ingest information from ORCID records to **auto-populate** forms
- Explain the **benefits** of your system connections with ORCID

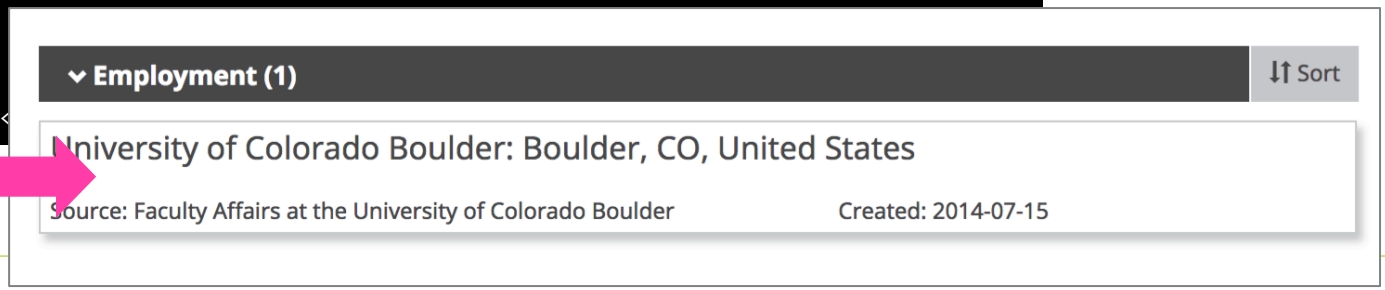
CONNECT

Remember those Access Token you stored?
Now you can use them to make API requests:

- Get data
- Add data

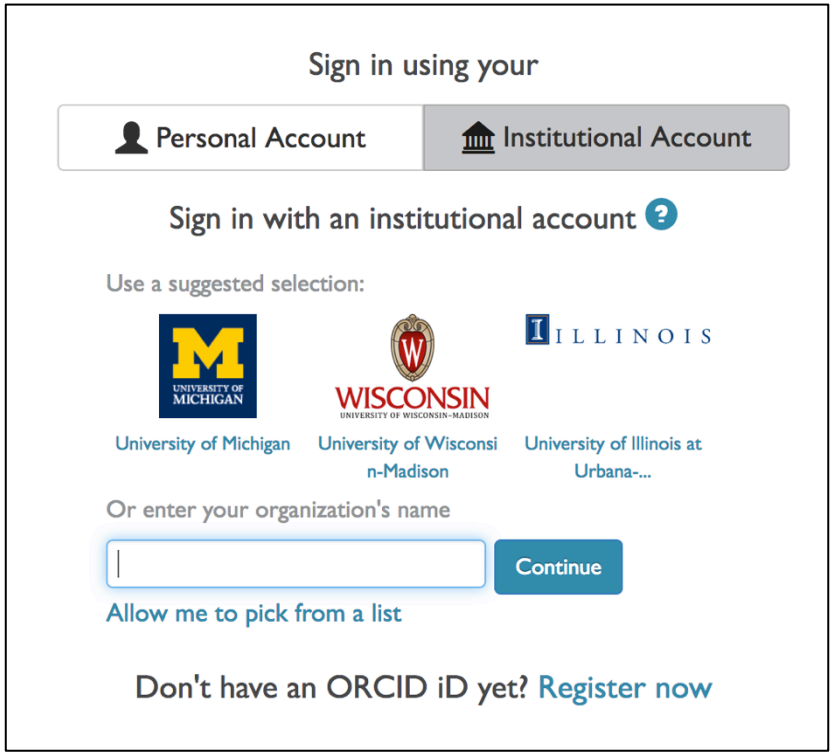
Per permissions you requested back at the COLLECT step

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<orcid-message xmlns="http://www.orcid.org/ns/orcid" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.orcid.org/ns/orcid  https://raw.github.com/ORCID/ORCID-Source/master/orcid-
model/src/main/resources/orcid-message-1.2.xsd">
<message-version>1.2</message-version>
<orcid-profile>
<orcid-activities>
 <affiliations>
   <af  ation>
     <  >employment<
```



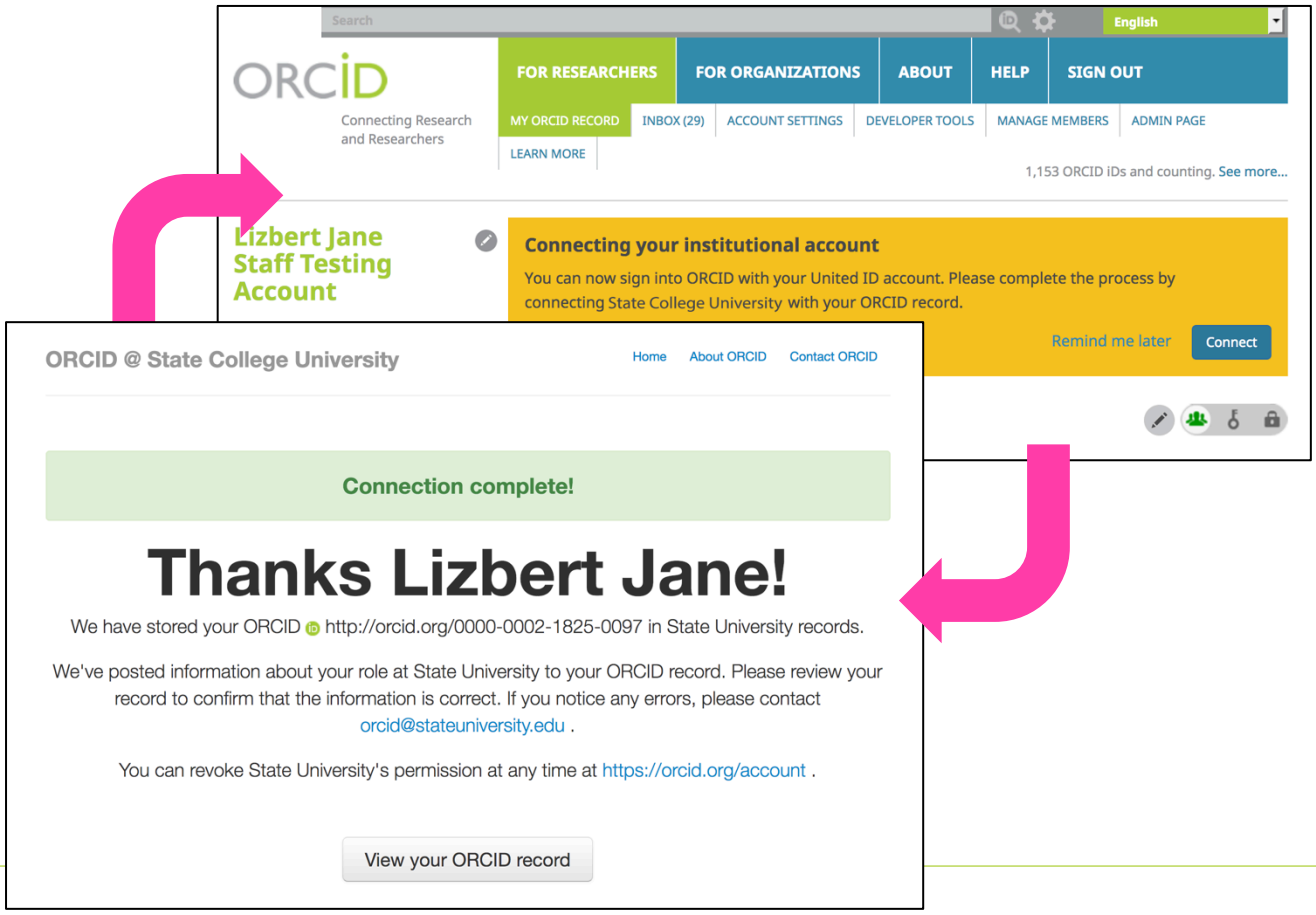
INSTITUTIONAL SIGN-IN

- **Works already for many institutions!**
  SURFconext & eduGAIN members, including US InCommon federation
- **If yours doesn't work, some configuration may be needed**
  Requires that you send a persistent NameID, eduPersonUniqueID (ePUID) *OR* eduPersonTargetedID (ePTID)

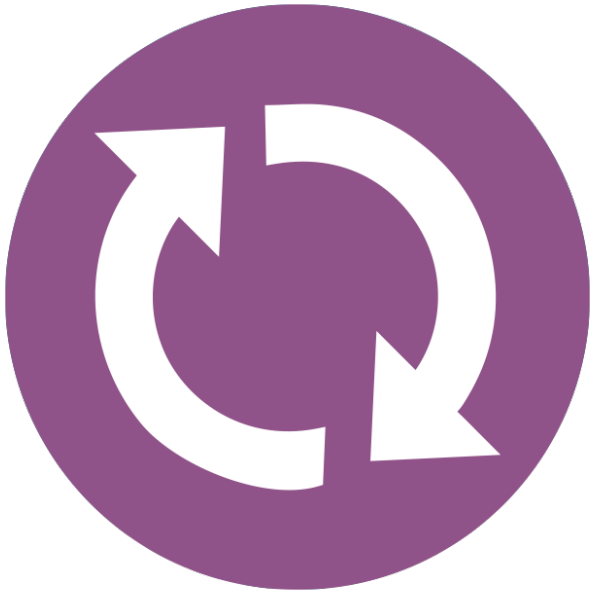


INSTITUTIONAL SIGN-IN CROSS-LINK

Automatically request iDs and record access permission from users who sign in via your institution



SYNCHRONIZE!



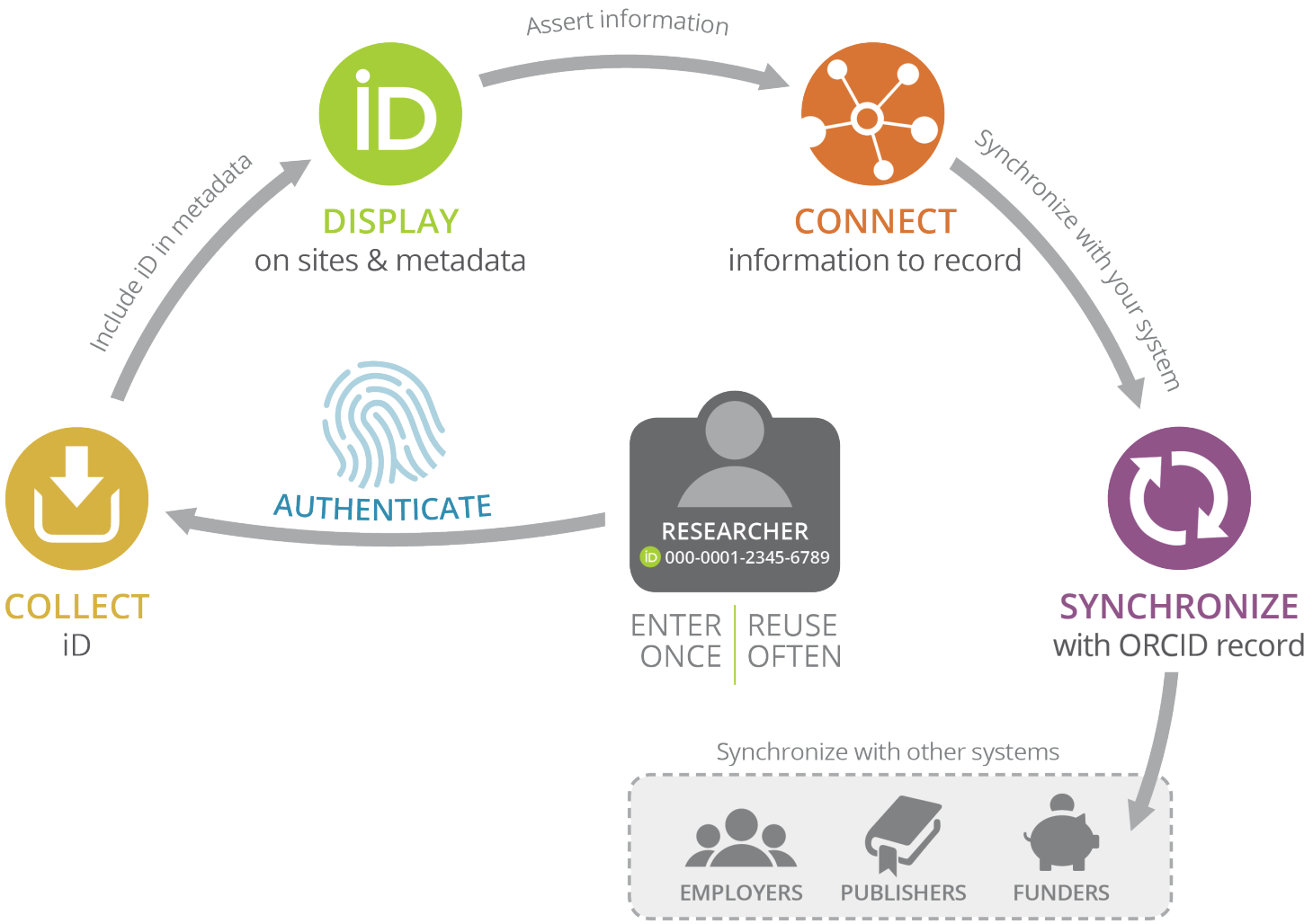
- Create **bidirectional information flow** (synchronization) between ORCID and your system AND/OR
- **Automatically update** ORCID records AND/OR
- Create a **search & link** wizard
- In all cases, explain **benefits** to individual

SYNCHRONIZE

...and keep on adding/getting data whenever it changes in your system, or in ORCID

- Access Tokens are long-lived (20yrs)
- **Webhooks** can notify your system when ORCID records you're watching change

COLLECT & CONNECT WORKFLOW



OUR PROGRESS TO DATE

- Full documentation on members.orcid.org
  - Updated for API 2.0
- Mapping current integrations
- Collect & Connect badges awarded

OUR NEXT STEPS

- Collect, Connect, and Communicate!
  - Communications toolkit
  - Use cases and best practice examples
  - Templates
- Combined C&C integration/ member list on orcid.org
- Recognition program for members

WORKING WITH YOU

- Map your integrations against Collect & Connect elements
- Discuss your future plans
- Share your experiences with ORCID community
- Award your badges!

Great! How do I get started?

members.orcid.org

Not sure where to start?

support@orcid.org