



HOW TO MEET COLLECT AND CONNECT

SUNET MEMBERS | 27 SEPTEMBER 2017

PAULA DEMAIN

COLLECT AND CONNECT!

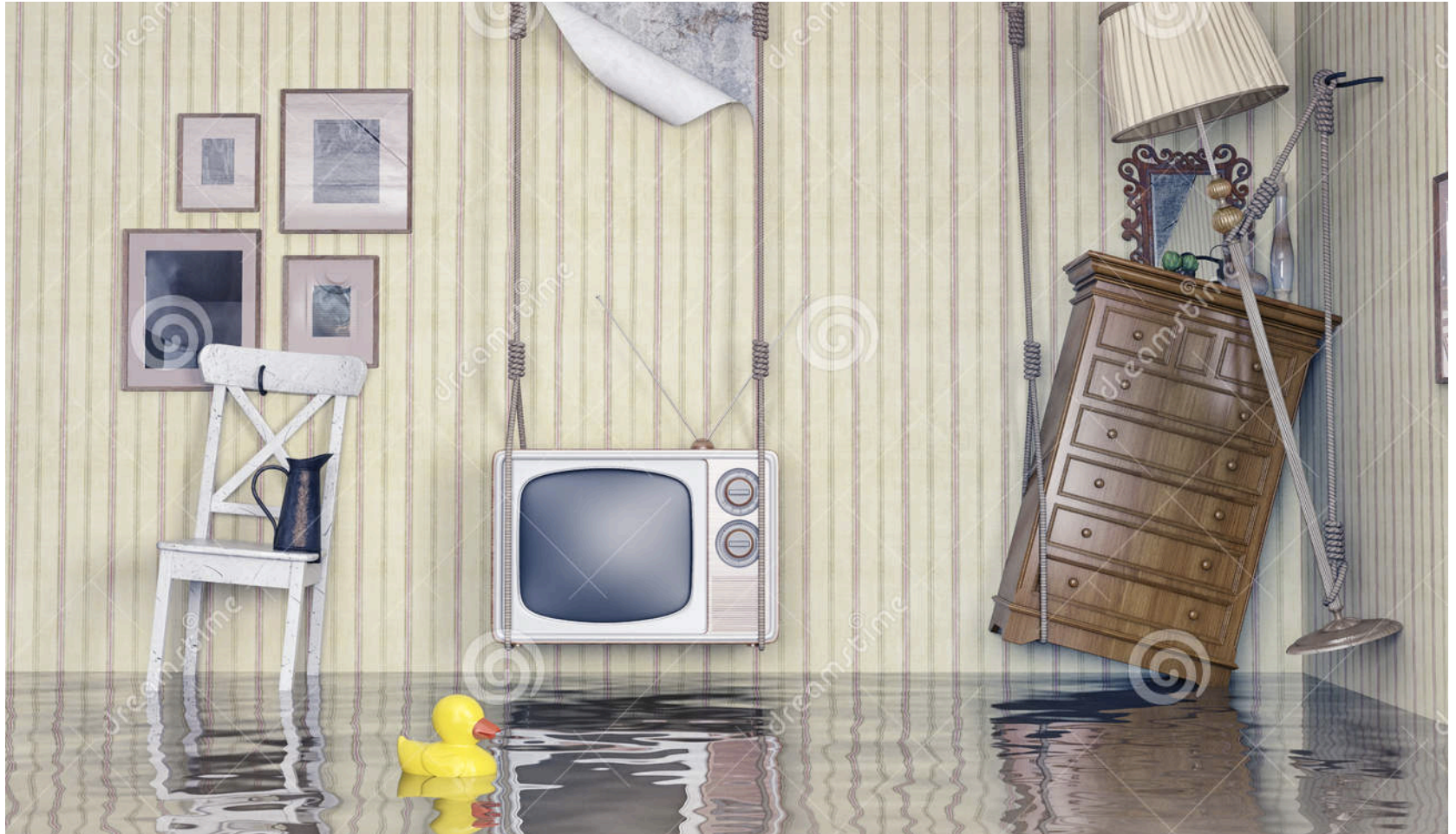
With hundreds of our members globally building ORCID identifiers into their systems, as well as some funders and publishers now requiring ORCID iDs, researchers are increasingly likely to encounter ORCID in their day-to-day life. We developed the Collect and Connect program to streamline the integration 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!

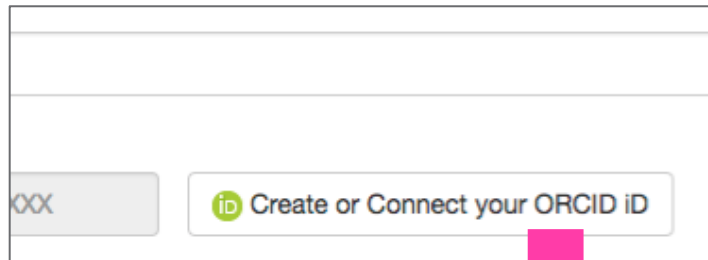


- Collect and store **authenticated** iDs
- Provide an **ORCID-branded** button for collecting iDs
- Explain **benefits** of having an iD for your researchers
- Explain **benefits** of including ORCID iDs at your site

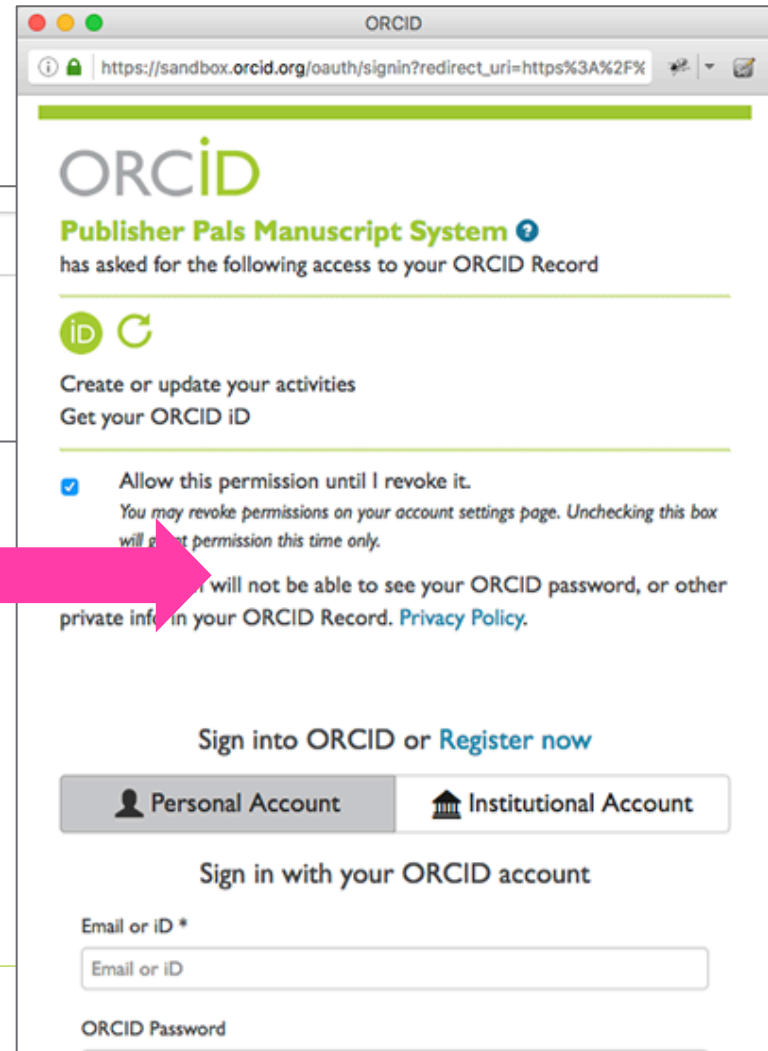


COLLECT authenticated iDs

It all starts here!

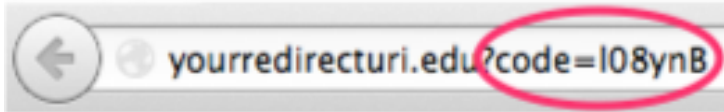


User clicks a link/button on your site, then signs into ORCID (or creates new account) and grants permissions to the scopes requested





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

Researcher Database

Name

ORCID iD

ORCID Access Token

Faculty ID

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:

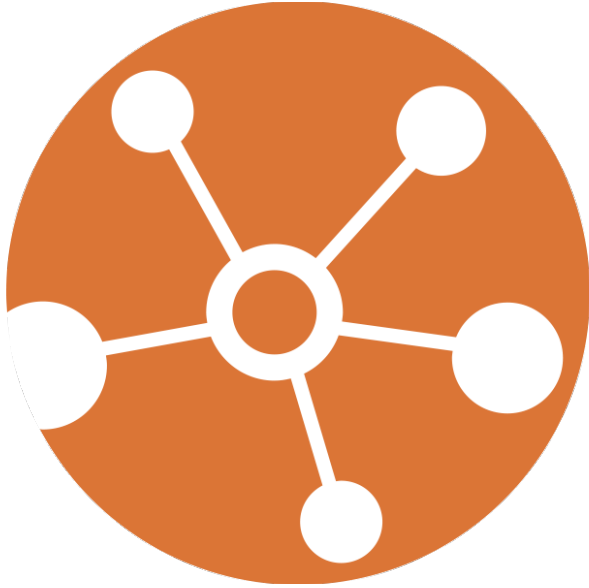


<https://orcid.org/0000-0001-6622-4910>

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



CONNECT!



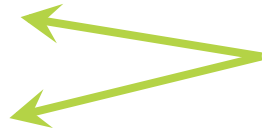
- Request permissions to **write to/update** the user's ORCID record to **assert** affiliation, works, etc OR
- Ingest information from ORCID records to **auto-populate** forms
- Explain the **benefits** of your system connections with ORCID



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.githubusercontent.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>
<affiliation>
<employment>
```

▼ Employment (1)

↑↓ Sort

University of Colorado Boulder: Boulder, CO, United States

Source: Faculty Affairs at the University of Colorado Boulder



Created: 2014-07-15




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 (ePUIID) OR eduPersonTargetedID (ePTID)

Sign in using your

 Personal Account  Institutional Account

Sign in with an institutional account 

Use a suggested selection:

 University of Michigan	 University of Wisconsin-Madison	 University of Illinois at Urbana-Champaign
---	--	---

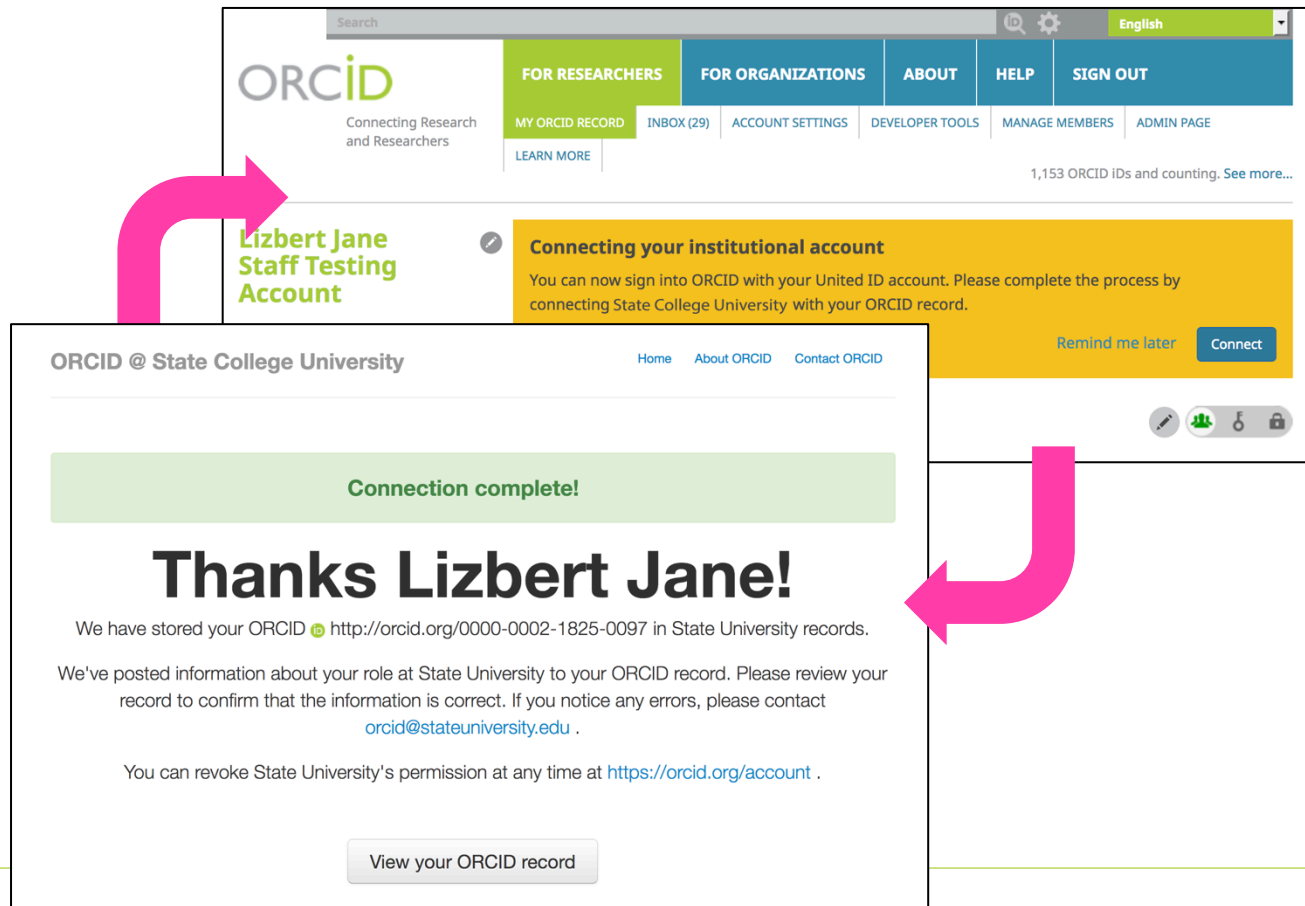
Or enter your organization's name

[Allow me to pick from a list](#)

Don't have an ORCID iD yet? [Register now](#)

INSTITUTIONAL SIGN-IN CROSS-LINK

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



The image shows a two-step process for connecting an institutional account to ORCID. The top screenshot shows the ORCID user interface for 'Lizbert Jane Staff Testing Account'. A yellow banner prompts the user to 'Connecting your institutional account' by linking their State College University account. A pink arrow points from this banner to the bottom screenshot. The bottom screenshot shows the 'ORCID @ State College University' page with a green 'Connection complete!' message and a large 'Thanks Lizbert Jane!' heading. It provides details on the stored ORCID ID and offers a 'View your ORCID record' button.

ORCID
Connecting Research and Researchers

FOR RESEARCHERS
MY ORCID RECORD
LEARN MORE

FOR ORGANIZATIONS
INBOX (29)
ACCOUNT SETTINGS
DEVELOPER TOOLS

ABOUT
HELP
SIGN OUT

MANAGE MEMBERS
ADMIN PAGE

1,153 ORCID iDs and counting. See more...

Lizbert Jane Staff Testing Account


Connecting your institutional account
You can now sign into ORCID with your United ID account. Please complete the process by connecting State College University with your ORCID record.

Remind me later **Connect**

ORCID @ State College University
Home About ORCID Contact ORCID

Connection complete!

Thanks Lizbert Jane!

We have stored your ORCID  <http://orcid.org/0000-0002-1825-0097> in State University records.

We've posted information about your role at State University to your ORCID record. Please review your record to confirm that the information is correct. If you notice any errors, please contact orcid@stateuniversity.edu.

You can revoke State University's permission at any time at <https://orcid.org/account>.

View your ORCID record



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

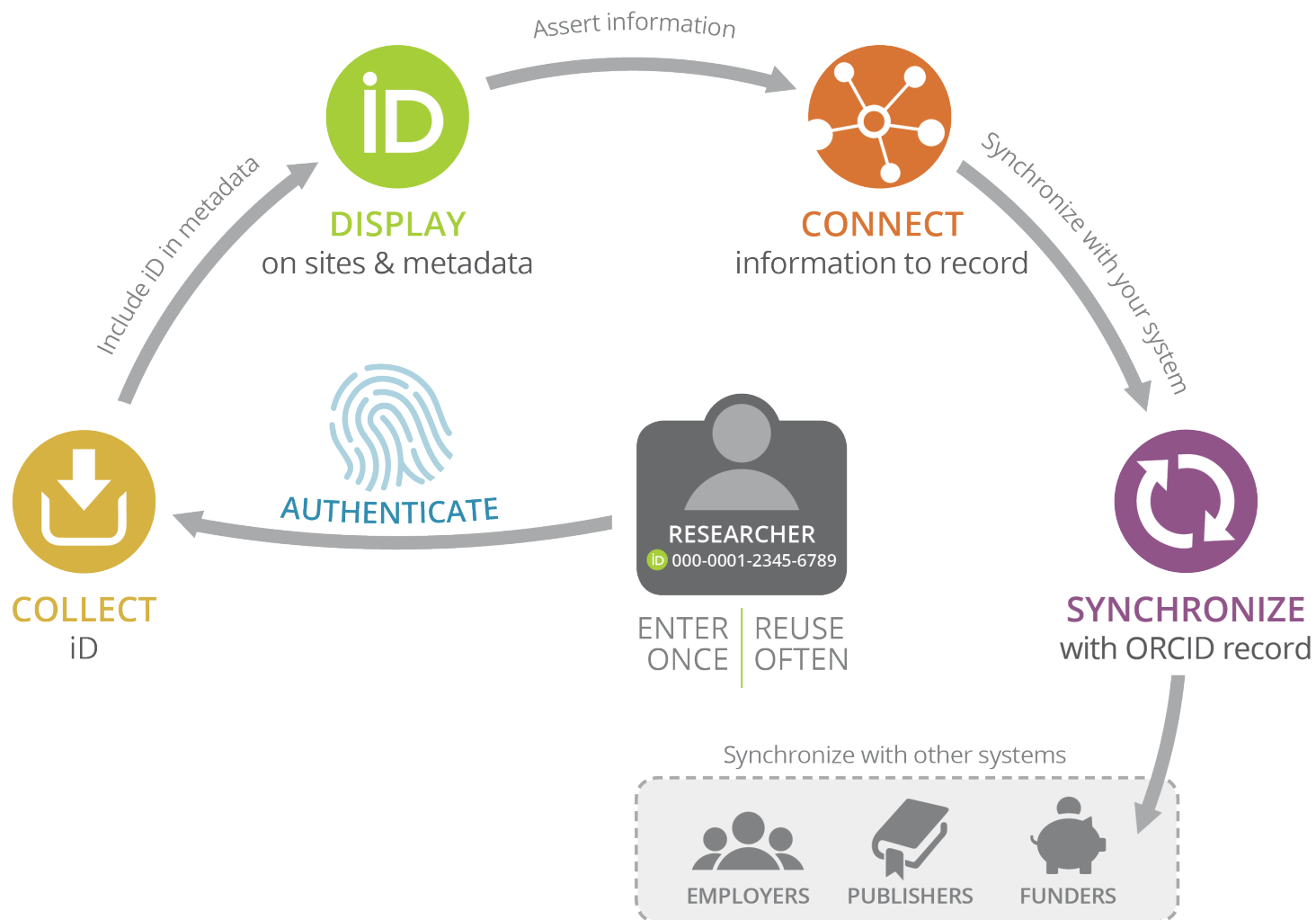


SYNCHRONIZE

...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

