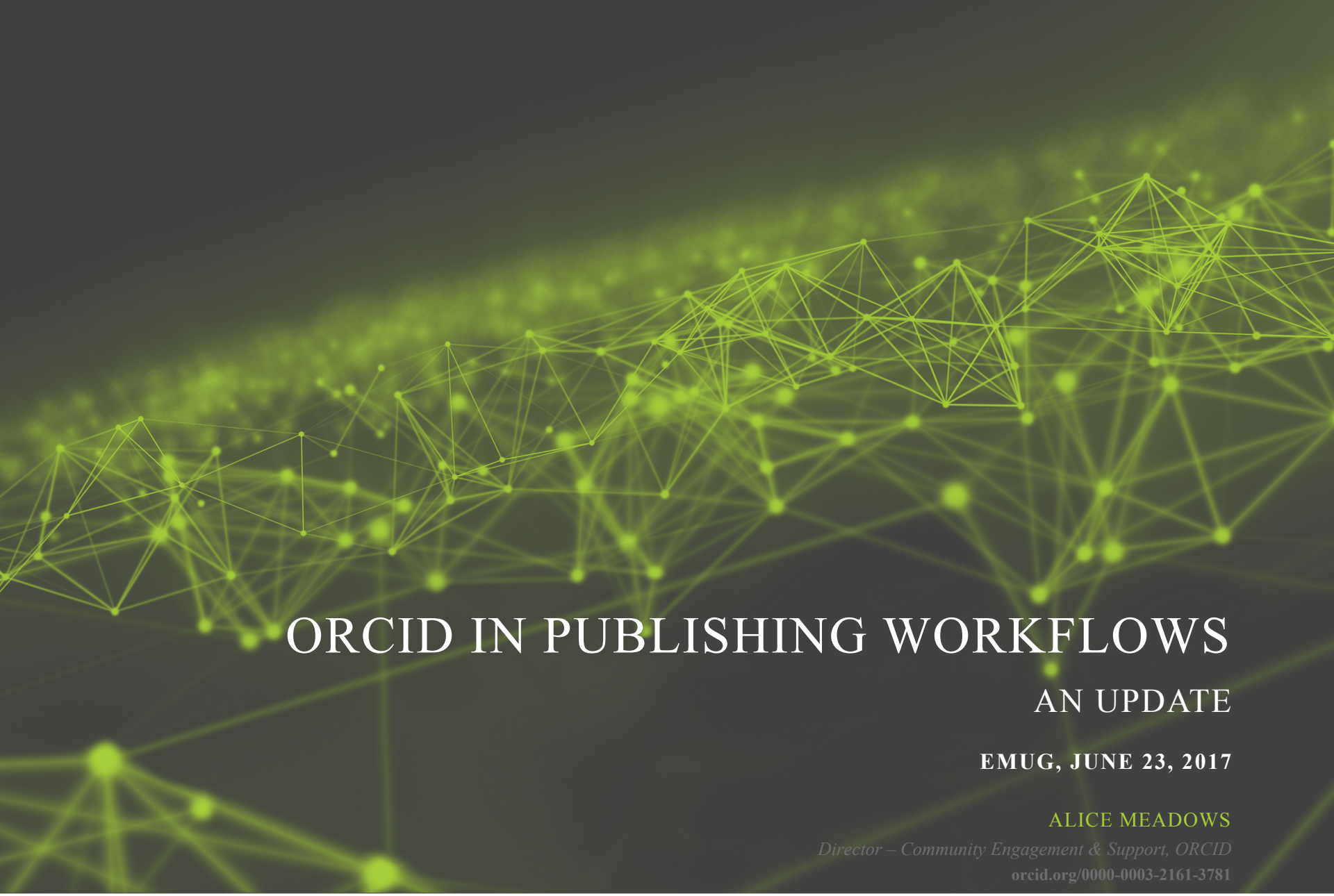


ORCID IN PUBLISHING WORKFLOWS

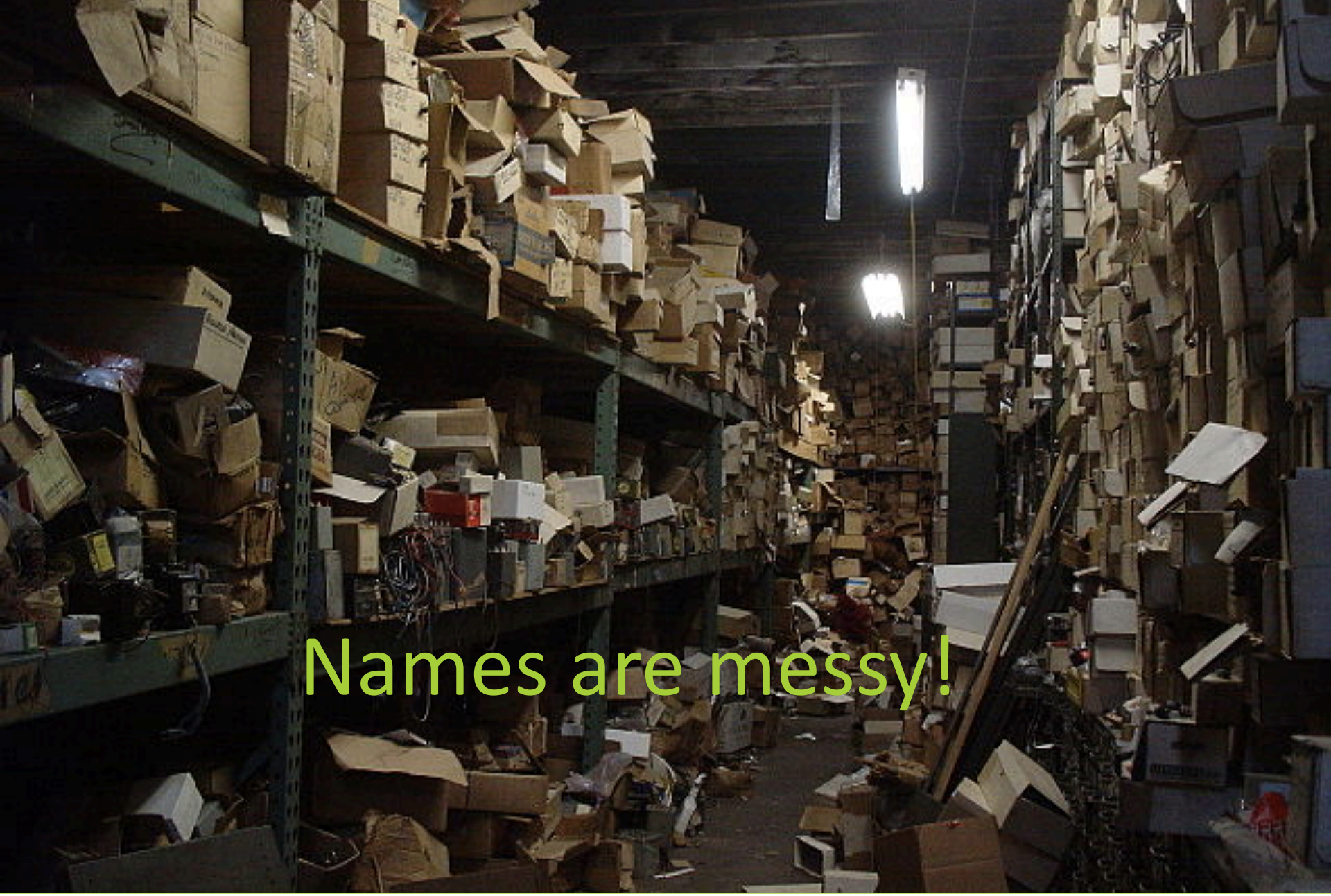
AN UPDATE

EMUG, JUNE 23, 2017

ALICE MEADOWS

Director – Community Engagement & Support, ORCID

orcid.org/0000-0003-2161-3781


Names are messy!

PIDS FOR PEOPLE, PLACES, & THINGS

ORCID'S VISION IS A WORLD WHERE ALL WHO PARTICIPATE IN RESEARCH, SCHOLARSHIP, AND INNOVATION ARE UNIQUELY IDENTIFIED AND CONNECTED TO THEIR CONTRIBUTIONS AND AFFILIATIONS ACROSS TIME, DISCIPLINES, AND BORDERS.

WHAT IS ORCID?

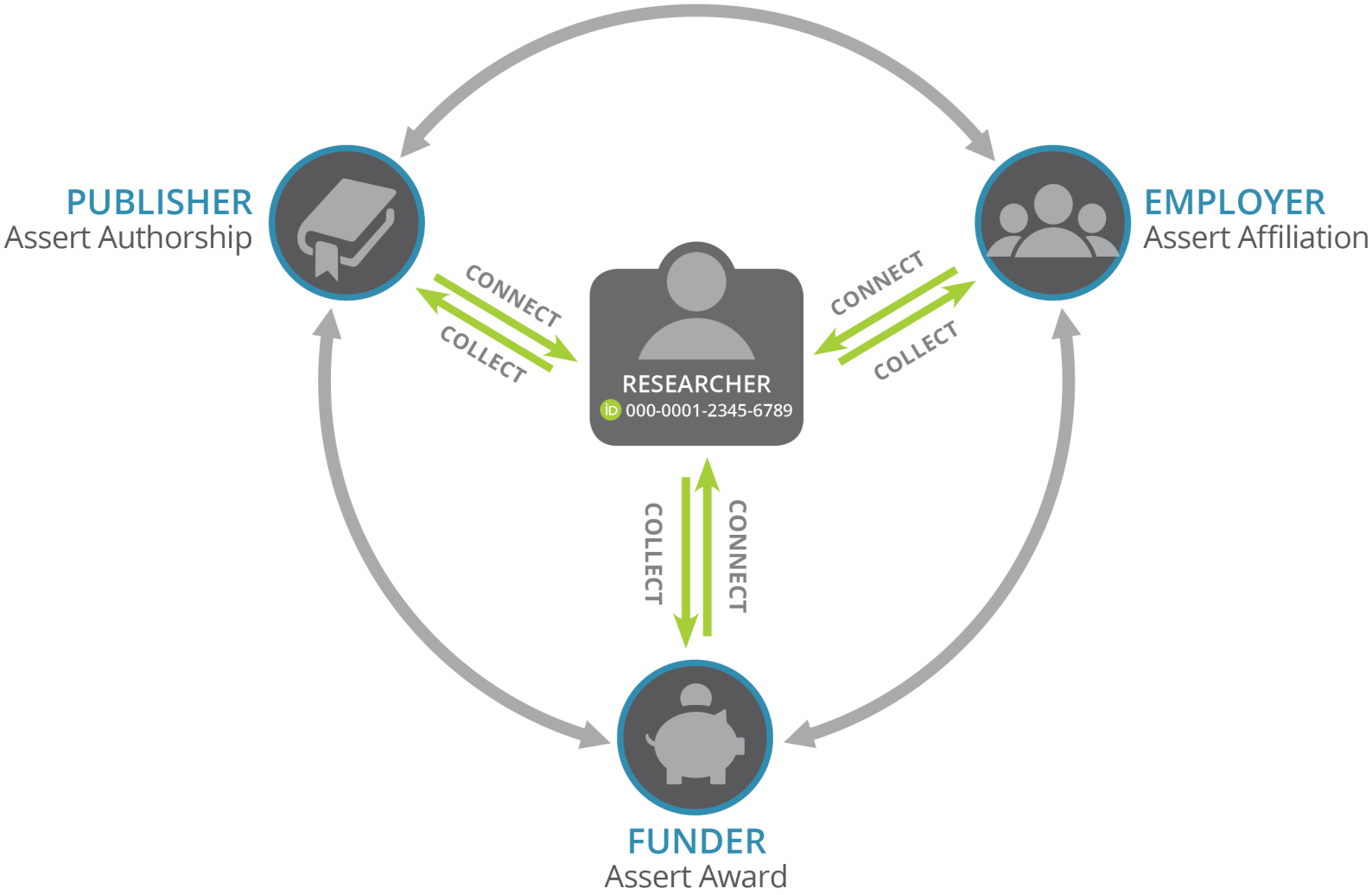
- ✓ ORCID is an open, not-for-profit organization that serves the research community by collaborating and innovating with organizations like yours

- ✓ We provide researchers with a unique identifier, an ORCID iD, that reliably and clearly connects them with their research contributions and affiliations

- ✓ Hundreds of systems have now integrated ORCID iDs – from grant application and manuscript submission to CRIS and other research information management systems, and more!

INTEROPERABILITY

ENTER ONCE
REUSE OFTEN



MAKING OUR DREAM A REALITY

Imagine if your authors could sign into their manuscript submission system of the journal they are submitting to using their ORCID credentials…

And their iD was then automatically included in their article's metadata…

And that information was used to automatically update their ORCID record with the DOI for the published article…

Then imagine that information flowing back into your systems AND all the other ORCID-embedded systems your author uses…

EM SINGLE SIGN-IN WITH ORCID

ORCID AUTO-UPDATE

- Enables researchers to authorize automatic updates to their ORCID record
- Currently used by Crossref and DataCite
- Crossref: during submission process
  - 150,000 records, 300,000 works updated
- DataCite: independent of submission process
  - 25,000 records, 50,000 works updated

http://ands.org.au/newsletters/share_issue18.pdf

HOW IT WORKS: ORGANIZATIONS

- **Collect** authenticated ORCID iDs from authors
- **Include** iDs in content registered with Crossref and DataCite
  - Provenance and source are essential
- **Display** iDs in published article
- **Connect** iDs to author's ORCID record when DOI is created
  - Crossref/DataCite auto-update
- **Synchronize** data with your own systems

http://ands.org.au/newsletters/share_issue18.pdf

HOW IT WORKS: RESEARCHERS

- **Sign up** for an ORCID iD
- **Authenticate** ORCID iD when prompted during submission (Crossref)
- **Authorize** Crossref/DataCite to read/update record
  - One time only authorization
- **Select** preferred visibility setting for works

http://ands.org.au/newsletters/share_issue18.pdf

MAKING OUR DREAM A REALITY

Now imagine that your peer reviewers could sign in to review an article using their ORCID credentials…

And that information was captured with their review so they could authorize you to automatically connect their review activity to their ORCID record…

What if that information could also flow to and from all the other ORCID-embedded systems your reviewers use…

EM SINGLE SIGN-IN WITH ORCID

ORCID PEER REVIEW FUNCTIONALITY

- Based on CASRAI Peer Review Services Dictionary
- Suitable for all types of peer review
- Review activities are added by third party, not researcher
- Enables organizations to recognize peer review activities
- Allows researchers to keep track of their own reviews

135,000+ reviews added to ORCID records to date

http://ands.org.au/newsletters/share_issue18.pdf

HOW IT WORKS: ORGANIZATIONS

- **Collect** reviewers' iDs and biographical information
- **Display** reviewers' iDs
- **Connect** review activity data to reviewers' ORCID records
- **Synchronize** your system's data with reviewers' records

Only available with API 2.0

https://members.orcid.org/api/workflow/peer-review

http://ands.org.au/newsletters/share_issue18.pdf

HOW IT WORKS: RESEARCHERS

- **Sign up** for an ORCID iD
- **Authenticate** ORCID iD when prompted
- **Authorize** reviewing organization to read/update record
- **Select** preferred visibility setting for review data

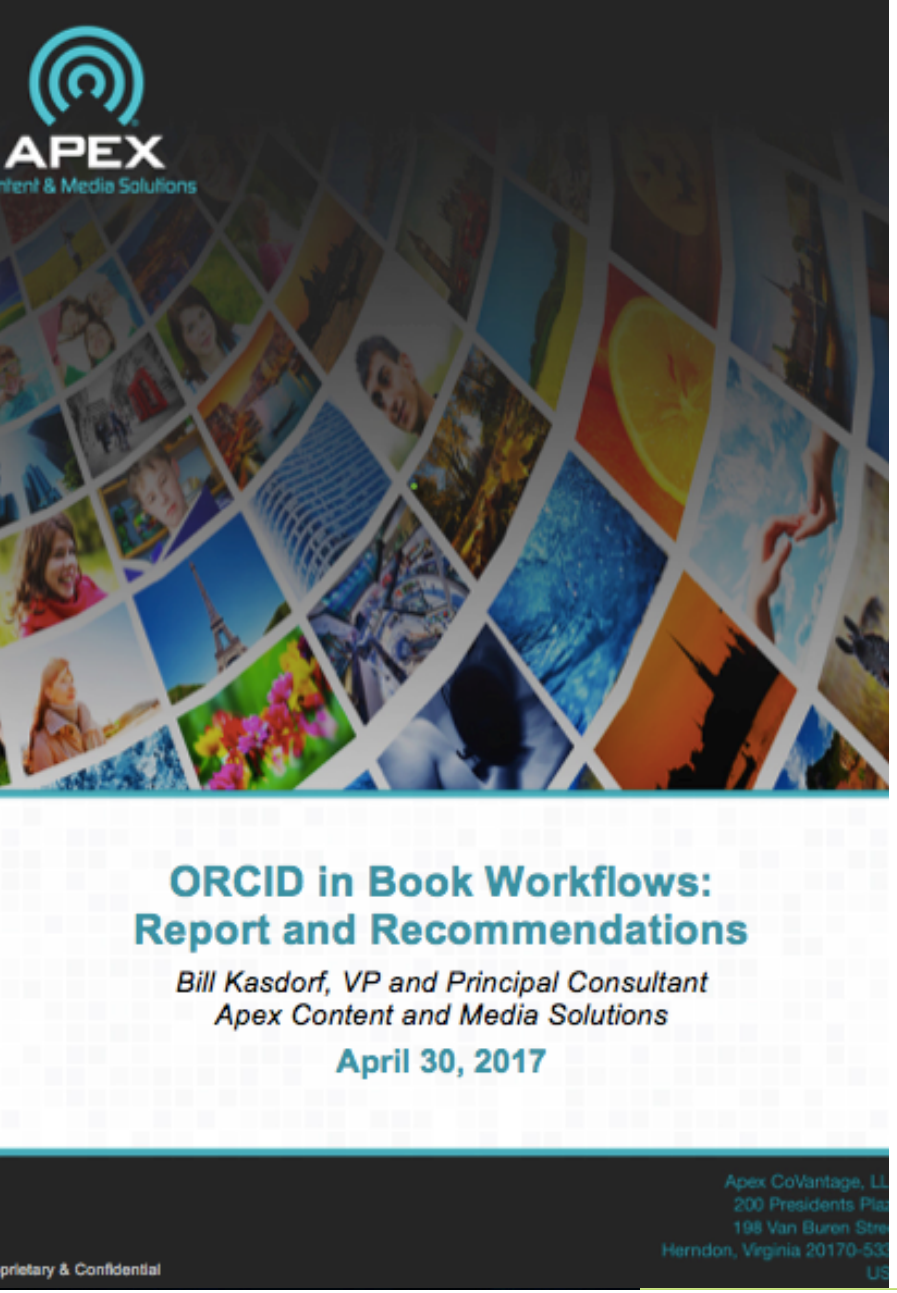
http://ands.org.au/newsletters/share_issue18.pdf

MAKING OUR DREAM A REALITY

Finally, imagine a world where your book authors could sign into your books submission system using their ORCID credentials…

And their ORCID iD was then carried through the production process and included in the metadata for the chapter/book…

Enabling it to be included in ONIX feeds and other sales and marketing data…



ORCID IN BOOKS WORKFLOWS

- Community Working Group launched September 2016
- Consultant appointed January 2016
- Report and recommendations available July 2017
- Community feedback and input welcome!

http://ands.org.au/newsletters/share_issue18.pdf

ORCID IN BOOKS WORKFLOW: BENEFITS

- Matching authors across book and journal systems
- Simplifying sign-on into systems
- Improved discovery, citation, and marketing
- Benefits in peer review
- Empowering semantic systems

ORCID IN BOOKS WORKFLOW: CHALLENGES

- Differences between book and journal workflows
  - And between different types of books workflows
- Lack of awareness of ORCID in key disciplines
- Dealing with backlist titles
- Lack of ORCID integration in books systems (but…)

ORCID IN BOOKS WORKFLOW: RECOMMENDATIONS

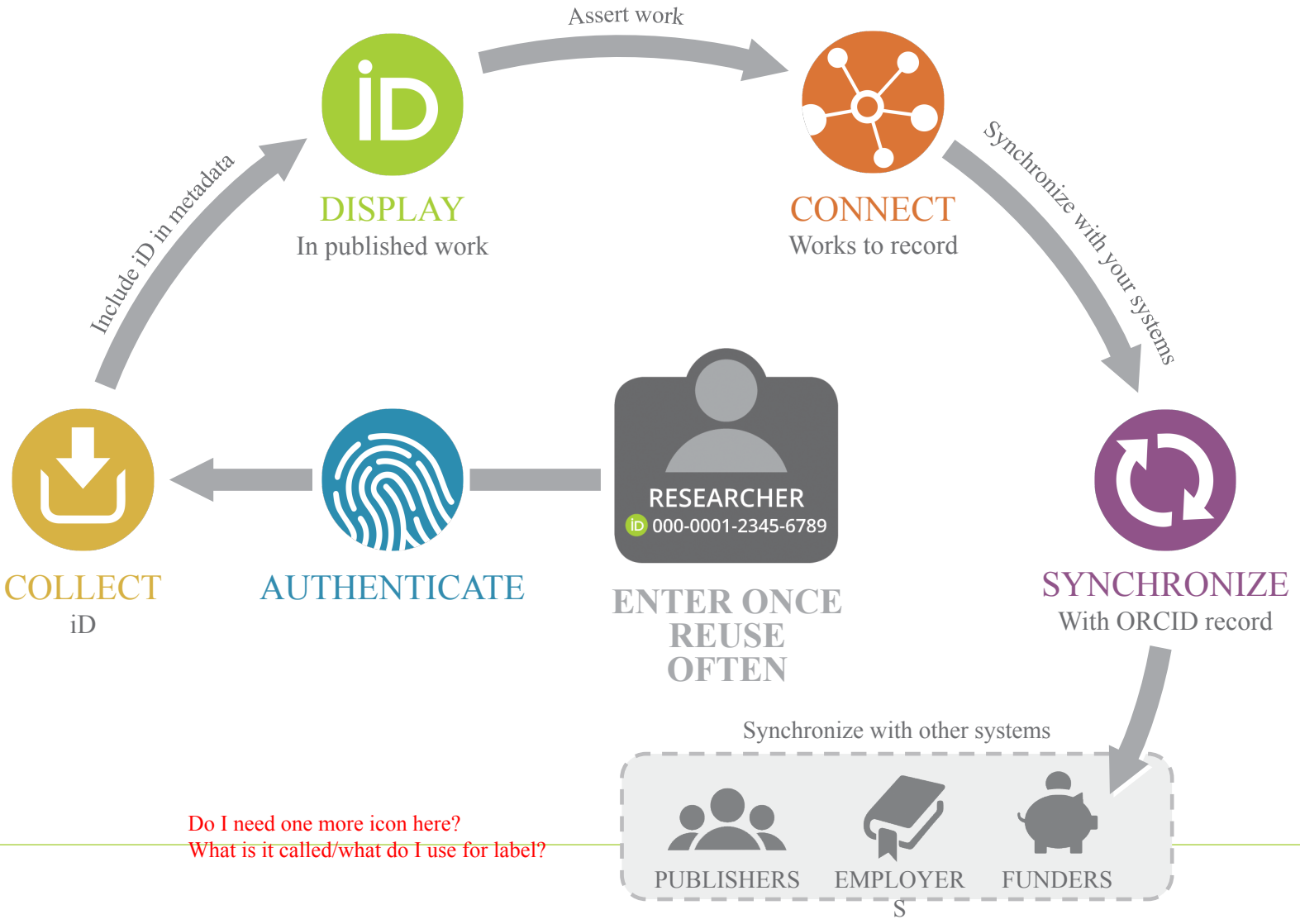
- Focus on author touchpoints and title management systems
- Prioritize publishers already using ORCID for journals and/or that publish conference proceedings, major reference works
- Collaborate with MLA Commons and others to build awareness/trust
- Develop/expand partnerships with JSTOR, OCLC, ISNI etc
- Share success stories!

MAKING OUR DREAM A REALITY

We need your help!

COLLECT & CONNECT WORKFLOW

— PUBLISHERS



Do I need one more icon here?
What is it called/what do I use for label?

COLLECT & CONNECT GOALS

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

COLLECT!

✓Collect and store **authenticated** iDs and provenance (source)

✓Provide an ORCID-branded button for collecting iDs

- **Explain benefits of having an iD for your researchers**
- **Explain the benefits of including ORCID iDs at your site**

DISPLAY!

✓Include ORCID iDs in metadata

- **Display the 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**

CONNECT!

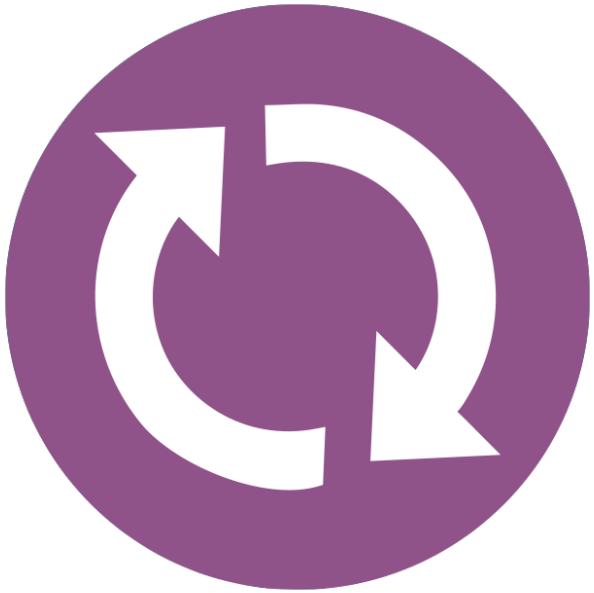
✓Request permissions to write to/update the user's ORCID record to assert affiliation, works, and more (with provenance) AND/OR

- Ingest information from ORCID records to auto-populate forms

AND

- **Explain the benefits of your system connections with ORCID**

SYNCHRONIZE!



- Create bidirectional information flow (synchronization) between ORCID and your system AND/OR
- **Automatically update ORCID records** AND/OR
- Create a search & link wizard

AND

- **In all cases, explain benefits to individual**

COLLECT & CONNECT WITH EDITORIAL MANAGER

QUALIFYING FOR YOUR OWN COLLECT & CONNECT BADGES IS AS EASY AS 1,2,3!

1. Make sure you're using the latest version of Editorial Manager
2. Comply with the communications elements of Collect & Connect
3. Contact support@orcid.org so we can review your messaging and display of iDs

Thank you for helping us enable researchers to spend more time making contributions and less time managing them

Enter Once | Reuse Often