

## **ORCID : Admin Configuration**

Released : 5.5.0 / 4.24.0

There are three ORCID configuration screens available in the Administrator tab. The functions available in each screen are described in this document, along with details of how Pure is described in ORCID as a Trusted Organisation.

The "Update ORCID With Pure Data Job" is described as well.

## Administrator > System settings > ORCID

Editor 🔹 Master data 👻	BFI   * Dashboard Award management   * Administrator	
Overview	Configuration Discard changes and refresh values	Save
Jobs	Configuration	
System settings		Search
Author contribution	S results 🔍 👻	
Bibcode	The URI pointing to the place to look up ORCID IDs	orcid
Bulk operations	This is used when pressing the 'Check' button when assigning an ORCID ID to a person. Should not end with a '/'.	
Cache	http://orcid.org	
Classified source limitations		
Confidentiality	The URI pointing to ORCID member web service URI for the ORCID web service that is used for creating new ORCID IDs and exporting data. Should not end with a '/'.	orcid
Content creation	https://api.orcid.org/v1.2	
Core configuration		
Datasets	The UKI pointing to the public part of the Web service This is used heres finally associated associated to the terms of the terms. Should not end with a '/'	orcid
Document access permissions	https://pub.orcid.org/v1.2	
Editing		
Enhorus	The URI pointing to the authentication web service	orcid
cpilorus	Should not end with a '/'.	
External Content tab	https://api.orcid.org/oauth/token	
Google analytics	The URI pointing to the ORCID OAUTH2 web service	orcid
HANDLE NET	The authorisation web service creates access codes granting Pure access to update ORCID records on behalf of researchers. Should not end with a '/'.	
Help	https://orcid.org/oauth/authorize	
Hierarchy depth		······································

You should not have to edit any of the content on this screen. The URIs are default populated.

Note that the facility to select whether or not Personal users can edit the ORCID ID input or create a new ORCID ID directly from the Person editor has been removed. These changes are a result of new process flows at ORCID's end.

## Administrator > ORCID > Configuration

Overview	Configuration
Jobs	Configuration
System settings	ORCID Credentials
Security	By providing the institution client credentials for the ORCID member API, it will be possible for users to link their
Messages and text resources	ORCID client ID
Documentation	
Terms of agreement	The institution specific identification ID provided by ORCID upon registering the institution.
Keywords	ORCID client secret
ORCID	The institution specific secret key provided by ORCID upon registering the institution.
Configuration	
Export to ORCID	
Import	Save Discard changes and refresh settings

In order to synchronise with ORCID (either just the 'basic' synchronization that links the individual's profile with their ORCID ID, or the more 'advanced' synchronization that exports the individual's content and limited profile information to their ORCID record), the ORCID Client ID and ORCID client secret must be input.

#### Administrator > ORCID > Export to ORCID

rview	Evenent to OBCID
05	Export to ORCID
stem settings	Enable export of Pure content to ORCID
curity	Select whether or not to allow Personal Users to choose to export Pure content to to ORCID. Content that will be
essages and text resources	configured below). Affiliation details (institution + country + city, as per configured below). Other IDs (scopus
ocumentation	author ID, Researcher ID, Digital Author ID), and the Pure Portal UKL (if selected below).
erms of agreement	
ywords	Send Pure Portal URLs to ORCID
RCID	On
onfiguration	Include individuals' Pure Portal URLs in the export to ORCID. When enabled, the individuals' Pure Portal URL will be visible as a hyperlink in the individuals' ORCID page, thereby giving ORCID readers the opportunity to navigate to the Pure Portal for further information on the
port to ORCID	researcher. Disable if the Pure Portal is not available from the internet.
port	Effective workflow step
port to Excel	Research output prior to this workflow step are not sent to ORCID.
tations and Impact Factors	
stem information	Affiliations
1	— The export to ORCID will include basic institutional information for each researcher.
ll text repository	Root organisation Aalborg University
	Organisational unit: Institution
orage	11#
nified Project Model	The organisational unit selected will be exported to ORCID, providing an institutional affiliation for individuals who choose to export their content to ORCID. You must ensure that the selected organisational unit includes the Country in the Postal address, and it is recommended
porting	that you also include the City (otherwise, this will be populated in ORCID as N/A).
oplications	Ringgold ID of the Root organisation
vards	ringgold The Ringgold dentifier (e.g. 9144) of the Root organization used when exporting affiliations to ORCID. By providing your institution's
irricula Vitae	Ringgold Identifier, when users export their Pure content to ORCID, their institutional affiliation will be recorded in ORCID.
atasets	
hical reviews	ORCID work type mapping file
ents	Pure Research Output types are mapped to the ORCID Work types as per the attached mapping file. You can view this file in File Handles. If you wish to edit the mapping applied, upload an updated mapping file here.
ternal persons	1
ipacts	orcid_worktype_mapping_rules.xml
ojects	11 KB, application/xml
	1

By default, the facility to export Pure content to ORCID is disabled. Upon enabling the export of content to ORCID, you will be asked to decide on / provide the following information:

#### a. Pure Portal URLs

Whether to include individuals' Pure Portal URLs in the export to ORCID. When enabled, the individual's Pure Portal URL will be visible as a hyperlink in the individual's ORCID page, thereby giving ORCID readers the opportunity to navigate to the Pure Portal for further information on the researcher.

This should be disabled if the Pure Portal is not available from the internet.



Note that the name of the link is "[Root organization<sup>1</sup>] profile page".

If Pure Portal URLs are initially enabled, but then subsequently disabled, previously exported URLs will not be deleted from ORCID records (but the user can delete it / edit the privacy settings directly in ORCID).

#### b. Effective workflow step

Research outputs prior to the selected workflow step are not exported to ORCID.

#### c. Root organization

The export to ORCID includes basic institutional affiliation and profile information:

- IDs (Scopus ID, Researcher ID, Digital Author Identifier)
- Institution name (as defined by the Root organization selected)
- Latest end date of affiliation(s) (if the individual is a former member of staff)

<sup>&</sup>lt;sup>1</sup> As identified in the 'Export to ORCID' configuration screen

You therefore need to decide which Organisation unit to identify as the Root orgnisation as this will appear in the individual's ORCID record as their institutional affiliation.

In order for exports to function, you **must ensure that the selected organisational unit includes the Country in the Postal address**. It is recommended that you also include the City (otherwise, this will be populated in ORCID as N/A).



#### d. Ringgold ID of the Root organization

The Ringgold identifier (e.g. 9144) of the Root organisation used when exporting affiliations to ORCID. It appears as though this information isn't currently used by ORCID in any way, however it is understood that in future, greater organizational information will be visible in ORCID, based on Ringgold content (e.g. address). Therefore, it is recommended that the Ringgold ID is input here (if you do not know your Ringgold ID, the ORCID team can advise).

#### e. ORCID Work type mapping file

Pure Research Output types are mapped to the ORCID Work types as per the default mappings described <u>here</u> (note the different mappings for each base). If you wish to edit the default mapping (e.g. if you have created additional research output sub-types), you can do so by editing the XML that is available via File Handles.

Pure Output types not included in the mapping file are not exported to ORCID.

ORCID work type output mapping file		_
File handle: File handles > ORCID work type output mapping file		
File handle		
Usage		
ORCID work type output mapping file 🛛 🔝		
Description <b>*</b>		
ORCID work type output mapping file		11
File *		
orcid_worktype_mapping_rules.xml orcid_worktype_mapping_rules.xml, 11 KB, application/xml	Show file	-
Change file		
Visibility *		
Public – No restriction 🐨		

Once your revised mapping file is ready, you can upload it here by selecting 'Replace' and then uploading the revised file.

After editing any of the settings here, remember to save the page (and if you have made any significant alterations that you wish to take effect immediately, run the 'Update ORCID With Pure Data Job').

## **Description of Pure in ORCID**

1. When exporting content to ORCID, the source of the content is identified in a number of places:

ORCID	FOR RESEARCHERS	FOR ORGANIZATIONS	ABOUT	HELP	SIGN IN
Connecting Research and Researchers	SIGN IN REGISTER FOR AN O	RCID ID LEARN MORE			
				41,276	ORCID iDs and counting. See more
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ORCID ID	King's College Lond	on: London, United King	gdom		
losandbox.orcid.org/0000-0001- 7870-7370	Source: PURE		Cre	ated: 2016-01	-29
Websites King's College London profile page	✓ Works (5)				1† Sort
Other IDs Scopus author ID: 55975120000	3D Coronary MRA bin-to-bin affine res radial image navigat 2014 [conference-paper SOURCE-WORK-ID: 1e URL: https://devel.atira.d	with 2D beat-to-beat tra piratory motion correcti or 64828f-6f13-44ec-99d3-69beb k/UKUG_January2016/portal/e	anslational ion using a bd01817 en/publication	and golden s/3d-corona	y
	Source: PURE		C I	Preferred sour	rce
	Striatal sensitivity to decision-making tas Cognitive affective & bel 2010-12   journal-article SOURCE-WORK-ID: a7 WOSUID: 00028543900 EID: 2-s2.0-79751485469 DOI: 10.3758/CABN.10. URL: https://devel.atira.d	personal responsibility k vavioral neuroscience 71b460-7ca2-4c9a-8ca5-bac0co 0004 4.460 k/UKUG_January2016/portal/e	in a regret- 6164e95 en/publication	-based s/striatal-se	D
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# **ELSEVIER**

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The source of this content is the "Name of your client application", which was completed at the time of registering your client application:

https://orcid.org/content/register-client-application-production-trusted-party

Therefore, you will need to contact ORCID if you wish to edit this.

2. When exporting to ORCID, Pure is known as a 'Trusted organisation' in the individual's ORCID account. In the Trusted organisation's details, there is the facility to include a link.

# ELSEVIER

ORCID	FOR RESEARCHERS	FOR ORGANIZAT	ONS ABOUT	HELP	SIGN OUT		
Connecting Research and Researchers	MY ORCID RECORD INBO		DEVELOPER TOOLS	LEARN MORE			
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	PLIRE https://www.elsevier.co	2015-12-10 com/solutions/pure	Update your Get your OR Update your information U	affiliations CID iD biographical Jodate your			

The source of this link is the "URL of the home page of your application", which was completed at the time of registering your client application:

https://orcid.org/content/register-client-application-production-trusted-party

Therefore, you will need to contact ORCID if you wish to edit this.

3. In ORCID messaging, each time Pure exports content to ORCID, a message is sent to the individual's inbox in ORCID. In that message there's a section for 'About' the source of the message:

ORCID	FOR RESEARC	HERS	FOR ORGAN	IZATIONS	ABOUT	HELP	SIGN OUT
Connecting Research and Researchers	MY ORCID RECORD	INBOX (I	I) ACCOUNT SE	TTINGS DEVEL	OPER TOOLS	LEARN MORE	
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3052-7148							
View public version						Archive	View on your record
	About PURE						
	Pure						

The source of this content is the "Short description of your client application", which was completed at the time of registering your client application:

https://orcid.org/content/register-client-application-production-trusted-party

Therefore, you will need to contact ORCID if you wish to edit this text. We suggest something like:

[Pure] is an enterprise research information system used by your institution to maintain records around research activities on campus. You or your proxy has set up a link between Pure and ORCID to update your content.

## Update ORCID With Pure Data Job

When an individual first sets up their export of content to ORCID, an export of the content is made immediately. The user can choose at any point to manually push content to ORCID from their Person editor screen. This can also be actioned by Administrators, Administrators of Persons, and Editors of Persons.

Josephine Bloggs Person		
Personal identification 👔		
First name(s)	Last name <b>*</b>	
Josephine	Bloggs	
Nationality		
Select nationality 🔻		
Name variant		
Add name variant		
Title		
Add title		
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55975120000 Scopus author I	D	Edit –
Add ID		
ORCID		
0000-0001-7870-73	70	C Export -
(Last exported: 29/01/16 2	1:52)	

You can choose to set up an automatic export of content for all Persons who have authorized the export of content to ORCID via the 'Update ORCID with Pure Data Job' (in the 'Cron Job Scheduling' tab > Synchronisation with external systems > Update ORCID with Pure Data Job).

Overview	- Undata (	DCID With Dura I	Data Joh			
lobs	Opdate C	DRCID WITH Pure L	Jata Job			
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Messages and text resources	Change sch	edule Start Job now				
ocumentation	Configurat	ion				
erms of agreement	Configure wit	nich user to run the job as	, and any additiona	I settings that appl	y to this job.	
Keywords	Edit configu	ration				
DRCID	Log entries	i				
mport	Start	Duration (hours)	Success	Warnings	Errors	Fatal error
xport to Excel	15. Dec 2015	12:380:01:12	18	1	0	
itations and Impact Factors	15. Dec 2015	12:140:01:12	18	0	0	
ntations and impact Factors	15. Dec 2015	00:540:00:47	16	0	0	
System information	14. Dec 2015	11:520:00:44	15	0	0	(

Notes:

- Where a user manually initiates an export via the Person editor screen, the action is not logged here in the Job log. If there is an issue with a manual export, it will be logged in the console log.
- If a user has revoked authorization for Pure to export content to ORCID in their ORCID account, the next time the Job is run, a warning will be generated and an export will not be attempted again (unless the user re-authorises the export from scratch).

#### Update ORCID With Pure Data Job

This job sends selected Pure data (limited profile and affiliation information, and research outputs) to ORCID, as initiated individually by each Personal user.

Last run logged 18 success and 1 warnings starting at 15. Dec 2015 12:38, running for 0:01:12 hours. Runs job UpdateOrcidRecordsCronJob as user root

#### Schedule

Scheduled for 16. Dec 2015 00:54. Next run after that is 17. Dec 2015 00:54. Change schedule Start Job now

#### Configuration

Configure which user to run the job as, and any additional settings that apply to this job. Edit configuration

#### Log entries

Start	Duration (hours)	Success	Warnings	Errors	Fatal errors
15. Dec 2015	12:380:01:12	18	1	0	0
Warnings	Search: Q			Export log entri	es as MS Excel
Status	Title and description				
Warning	Processing person ID 500 INFO: Updating Works in C WARN: Not authorized/for INFO: Done!	19 DRCID bidden. Clearing ORC	CID token. Error was	s: 401 Unauthorized	