ORCID : Admin Configuration

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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

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

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

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:

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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[1]] 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)

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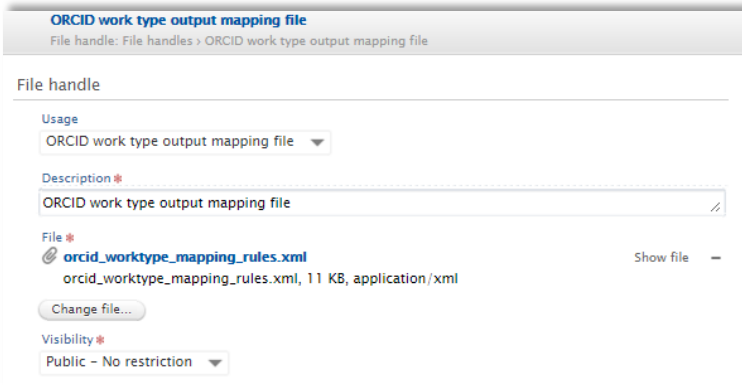
Once your revised mapping file is ready, you can upload it here by selecting 'Replace' and then uploading the revised file.

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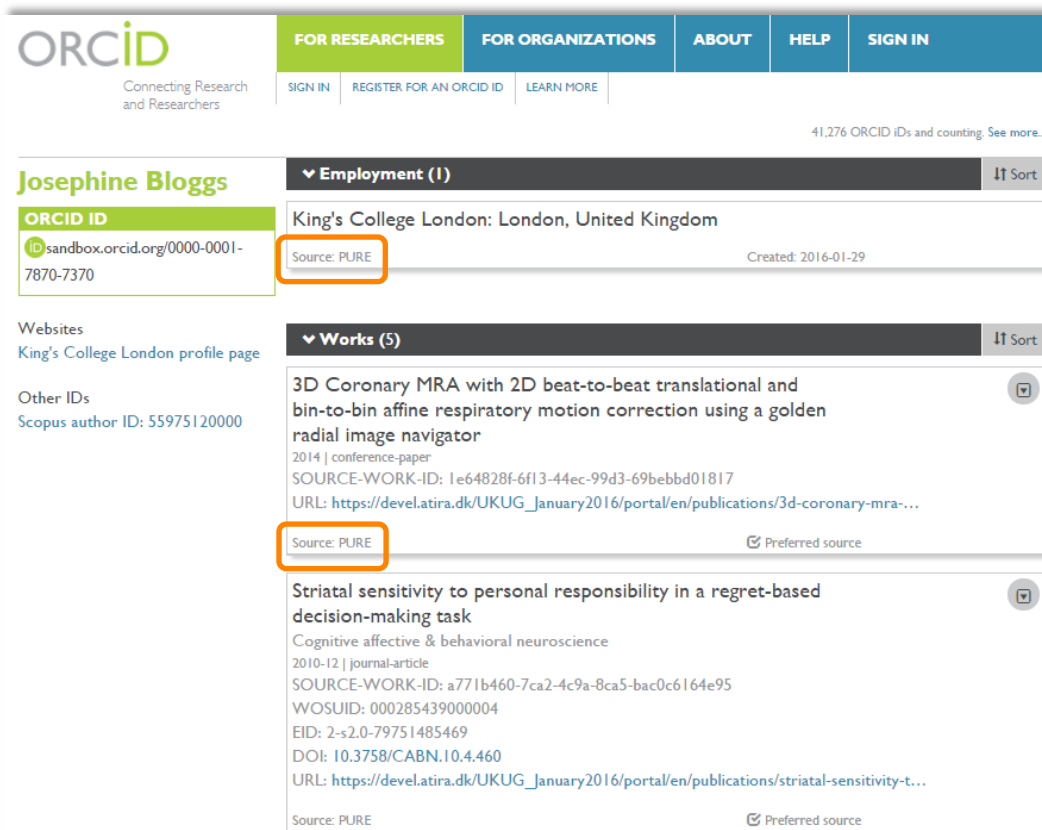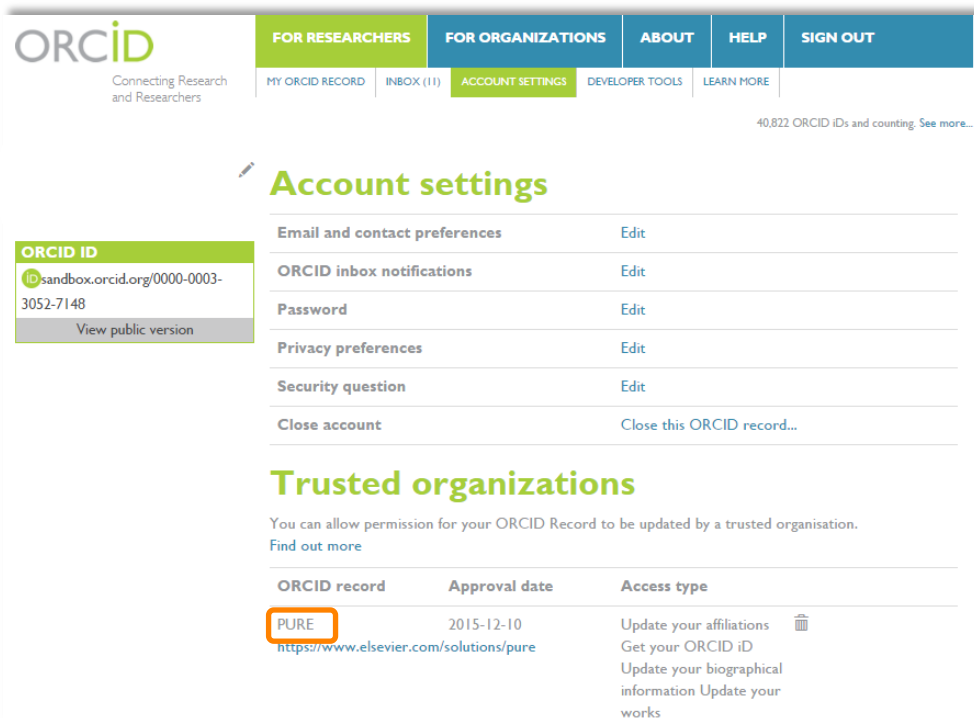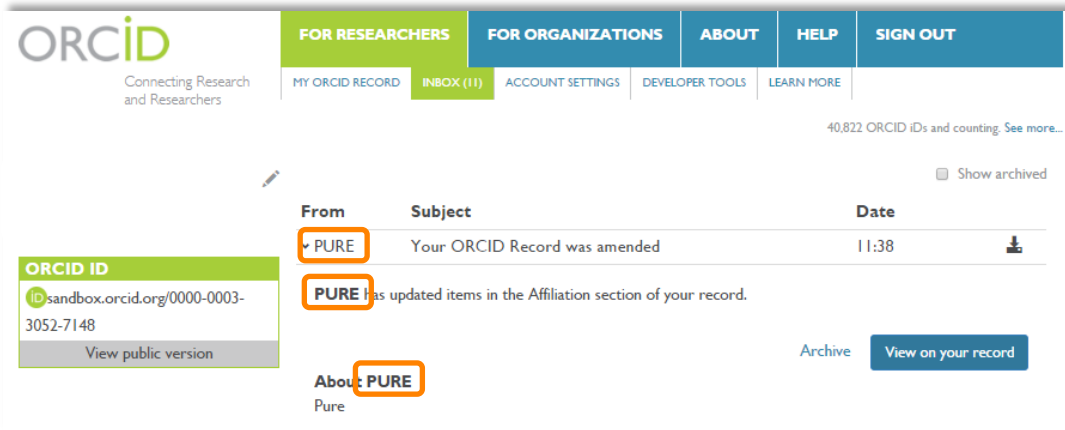
The source of this content is the "Name of your client application", which was completed at the time of registering your client application:

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.

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:
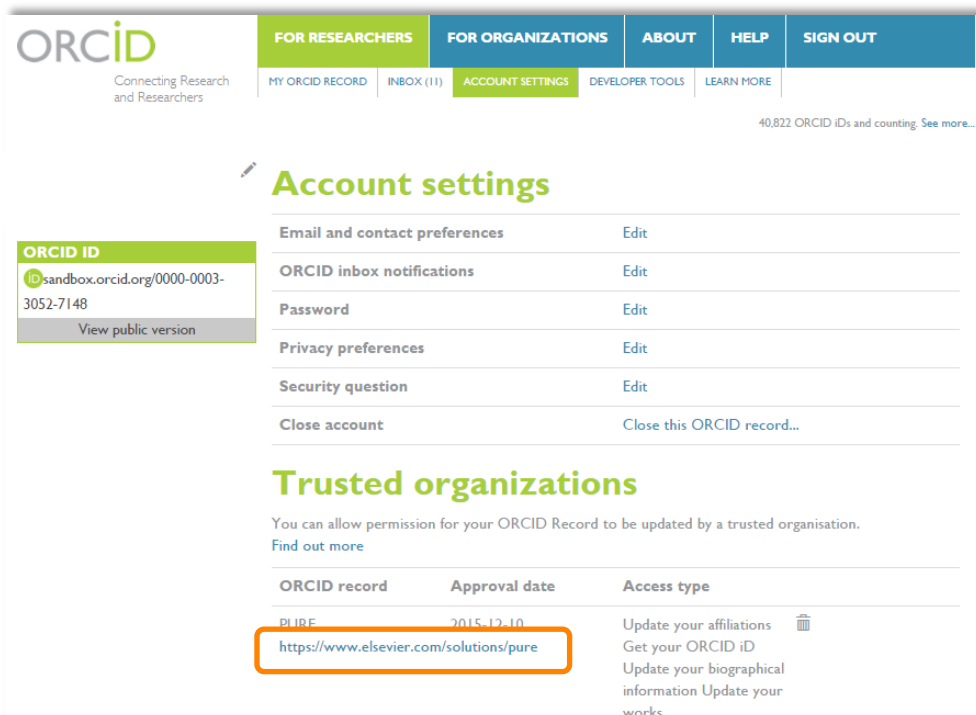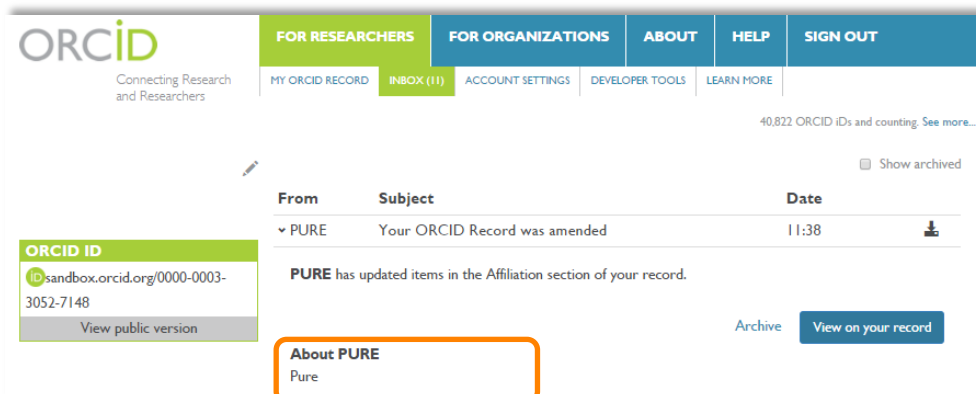

The source of this content is the "Short description of your client application", which was completed at the time of registering your client application:

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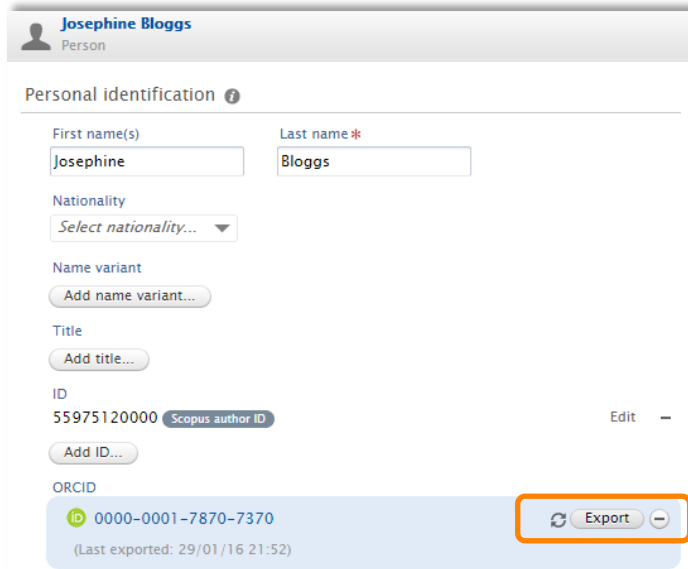
You can choose to set up an automatic export of content for all Persons who have authorized the export of content to ORCID via the 'Update ORCID with Pure Data Job' (in the 'Cron Job Scheduling' tab > Synchronisation with external systems > Update ORCID with Pure Data Job).
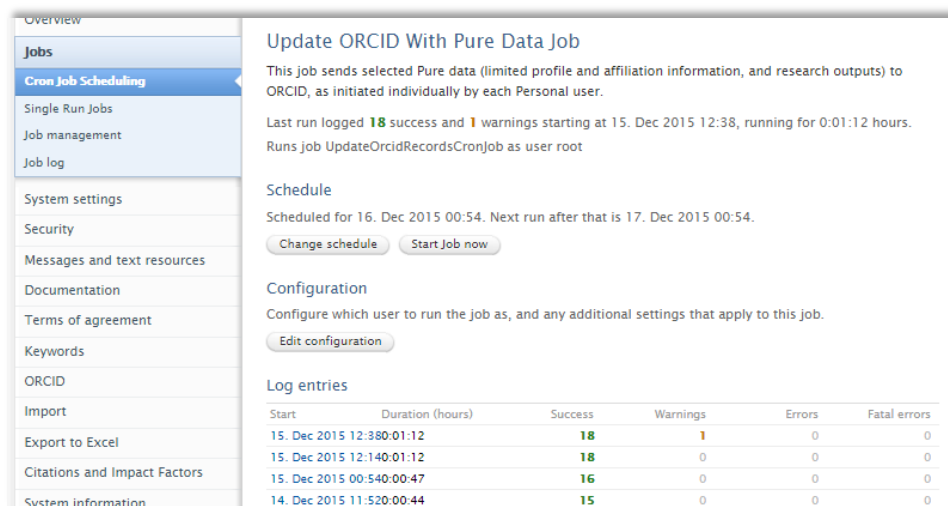
Notes:

- 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).

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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 12:38	0:01:12	18	1	0	0

Warnings ▼   Search: 🔍   [Export log entries as MS Excel]

Status	Title and description
Warning	**Processing person ID 5009** INFO: Updating Works in ORCID WARN: Not authorized/forbidden. Clearing ORCID token. Error was: 401 Unauthorized INFO: Done!