

## ORCID : Functionality for Personal Users

Released : 5.5.0 / 4.24.0

This document describes the functionality available for Personal Users.

### 'Basic' synchronisation

The 'basic' synchronization enables individuals to create their ORCID ID directly from Pure, and links the individual's profile with their ORCID ID.

Go to 'Edit profile' from the Personal overview screen to open the Person editor screen. From there, select 'Create or connect your ORCID ID':

The screenshot shows the 'Person editor' interface for a user named Josephine Bloggs. The 'Personal identification' section includes the following fields and options:

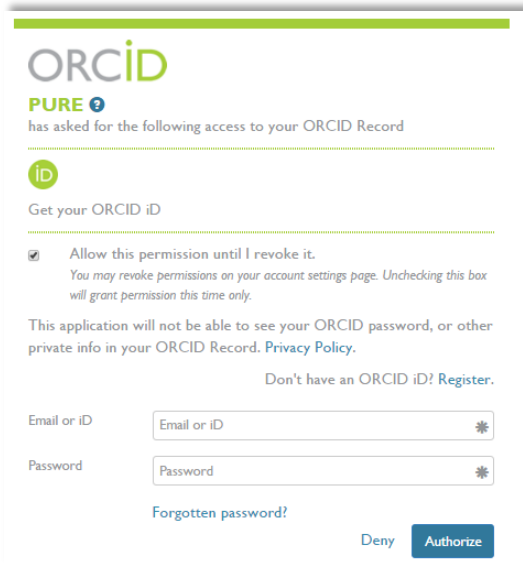
- First name(s): Josephine
- Last name\*: Bloggs
- Nationality: Select nationality...
- Name variant: Add name variant...
- Title: Add title...
- ID: 55975120000 (Scopus author ID) with an Edit button.
- ORCID: Create or Connect your ORCID ID (highlighted with an orange box).
- Profile photos: Add file...
- Links: Add link...

The user is then directed to an information screen advising them that they will be directed to the ORCID site:

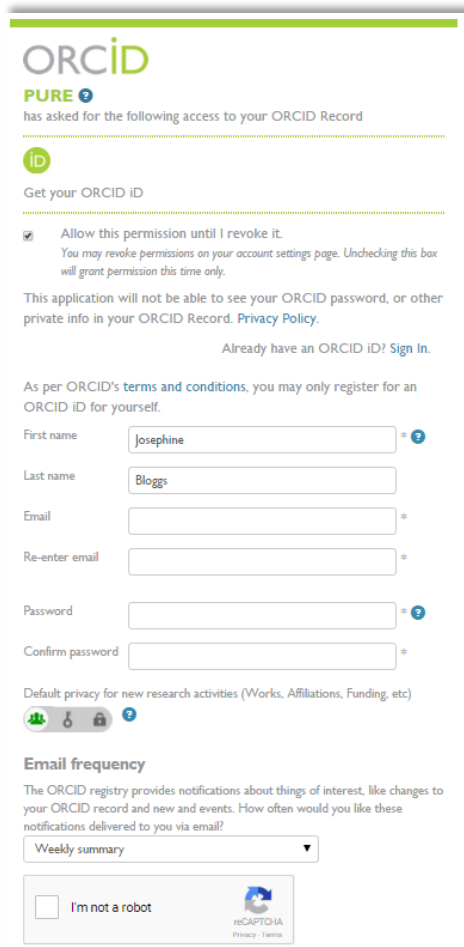
The screenshot shows a modal dialog box titled 'Connect with your ORCID ID'. The text inside reads: 'You will now be directed to the ORCID site where you can generate your ORCID ID (if you don't already have one) and link it here within your Pure profile.' At the bottom right, there are two buttons: 'Cancel' and 'Proceed'.

Upon selecting 'Proceed', the user is directed to the ORCID authorization screen.

- a. If the User already has an ORCID ID, s/he can input their login details and authorize Pure's access to obtain the ORCID ID.



- b. If the User does not yet have an ORCID ID, they should select **Register**, and follow the instructions on screen:



Following the authorization, the user will be re-directed to their Person editor screen, where it will be confirmed that the authorization was successful and the ORCID ID was linked. **Remember to save the record!**

The screenshot shows a user interface for editing a person's profile. At the top, the name 'Josephine Bloggs' is displayed next to a person icon. Below this is a section titled 'Personal identification' with a help icon. The form contains several fields: 'First name(s)' with 'Josephine', 'Last name\*' with 'Bloggs', 'Nationality' with a dropdown menu 'Select nationality...', 'Name variant' with an 'Add name variant...' button, 'Title' with an 'Add title...' button, 'ID' with '55975120000' and a 'Scopus author ID' tag, and 'ORCID' with '0000-0001-5398-032X'. A green checkmark and text 'ORCID for 'Josephine Bloggs' applied.' are visible below the ORCID field. At the bottom, there are sections for 'Profile photos' with an 'Add file...' button and 'Links' with an 'Add link...' button.

The user will also receive a verification email from ORCID that must be actioned in order to complete the registration process.

## 'Advanced' synchronisation

Once the 'Export content to ORCID' facility is enabled (see "ORCID : Admin Configuration" documentation), Personal Users will be able to authorize Pure as a 'trusted organisation' and export content to ORCID.

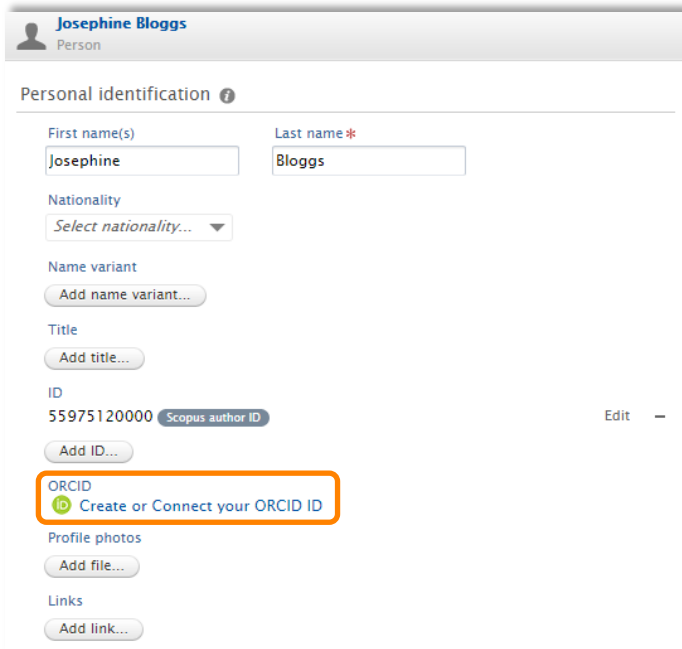
Only Personal Users (or their trusted users in Pure) can authorize the export of content from Pure to ORCID.

Content exported includes:

- Other identifiers (Scopus Author ID, Researcher ID, Digital Author ID)
- Limited organisational affiliation information
  - Institutional affiliation (along with the City and Country of the organisation)
  - End date of affiliation (if a former member of staff)
- Pure Portal URL (if enabled in the configuration)
- Research outputs
  - Publication state = ePub ahead of print + Published
  - Visibility = Public
  - Workflow status = configurable

## 1. Users with no ORCID ID yet, or no ORCID ID registered in Pure

To set up the export of content to ORCID, go to 'Edit profile' from the Personal overview screen to open the Person editor screen. From there, select 'Create or connect your ORCID ID':



Josephine Bloggs  
Person

Personal identification ⓘ


First name(s)  Last name\*

Nationality

Name variant

Title

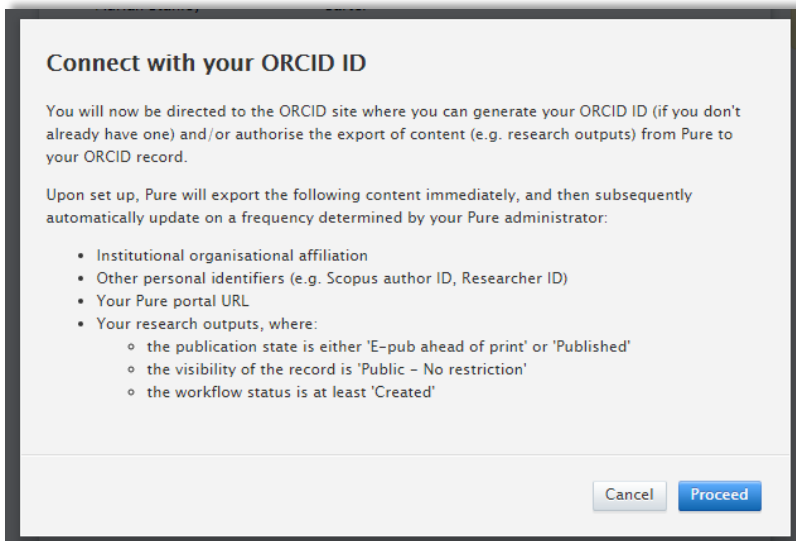
ID  
55975120000 Scopus author ID Edit

ORCID  
 [Create or Connect your ORCID ID](#)

Profile photos

Links

The user is then directed to an information screen advising what content will be exported:



**Connect with your ORCID ID**

You will now be directed to the ORCID site where you can generate your ORCID ID (if you don't already have one) and/or authorise the export of content (e.g. research outputs) from Pure to your ORCID record.

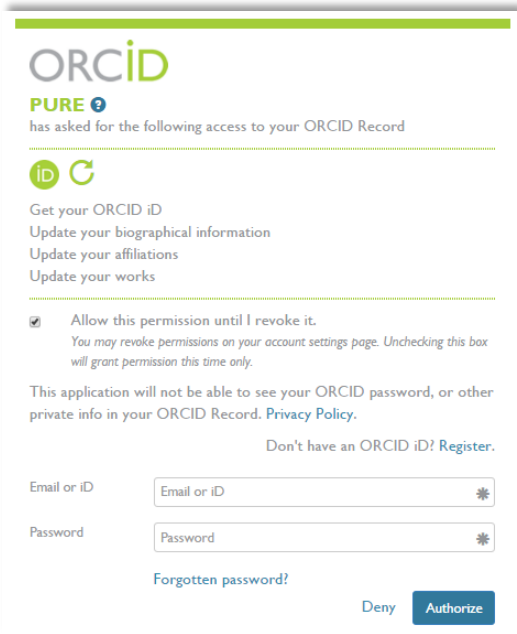
Upon set up, Pure will export the following content immediately, and then subsequently automatically update on a frequency determined by your Pure administrator:

- Institutional organisational affiliation
- Other personal identifiers (e.g. Scopus author ID, Researcher ID)
- Your Pure portal URL
- Your research outputs, where:
  - the publication state is either 'E-pub ahead of print' or 'Published'
  - the visibility of the record is 'Public - No restriction'
  - the workflow status is at least 'Created'

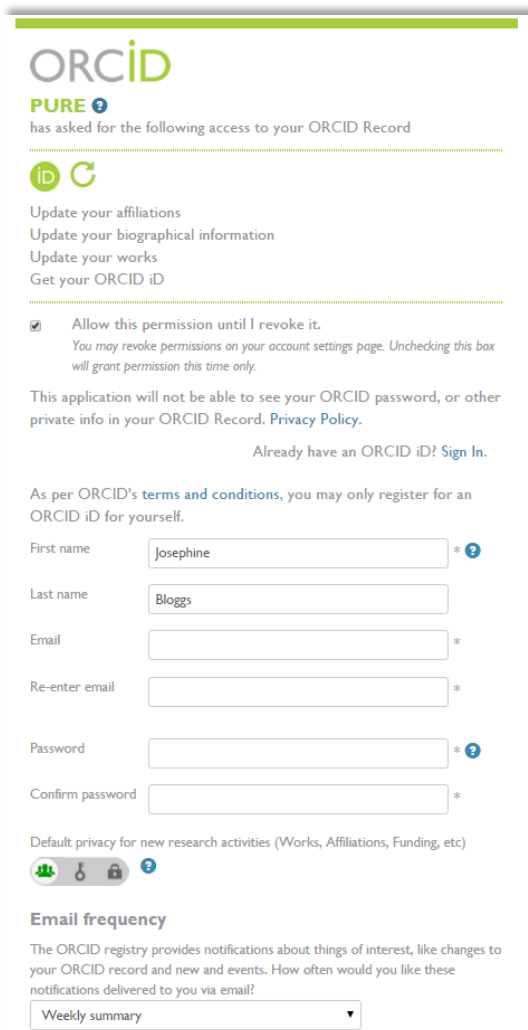
Note that whether the Pure portal URL is exported depends on the local configuration, and the effective workflow status of outputs to be exported is as per the local configuration.

Upon selecting 'Proceed', the user is directed to the ORCID authorization screen.

- a. If the User already has an ORCID ID, s/he can input their login details and authorize Pure’s access.



- b. If the User does not yet have an ORCID ID, they should select **Register**, and follow the instructions on screen:



## Notes:

- Selecting 'Allow this permission until I revoke it' will export content from Pure to ORCID this one time only. The next time an export is attempted (either 'on-demand' or via the Job), Pure will attempt the export but will be informed by ORCID that the authorization has been revoked. Pure will not attempt again (unless the User re-authorises the export of content from Pure to ORCID)
- The export from Pure respects the default privacy settings selected
- ORCID recommend that the email frequency is set to Quarterly summary
  - (note that every export of content from Pure to ORCID generates 3 'messages' within ORCID)

Following the authorization, the user will be re-directed to their Person editor screen, where it will be confirmed that the authorization was successful and the content was exported<sup>1</sup>. **Remember to save the record!**

The screenshot displays the 'Person' editor interface for 'Josephine Bloggs'. The 'Personal identification' section includes the following fields and options:

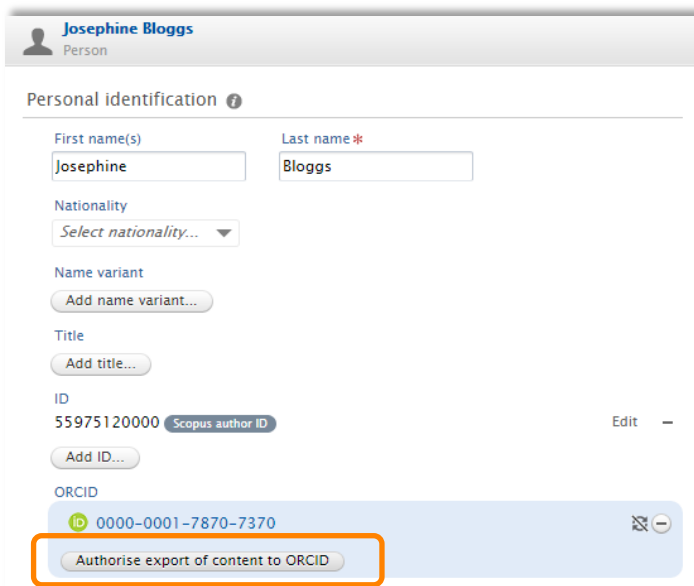
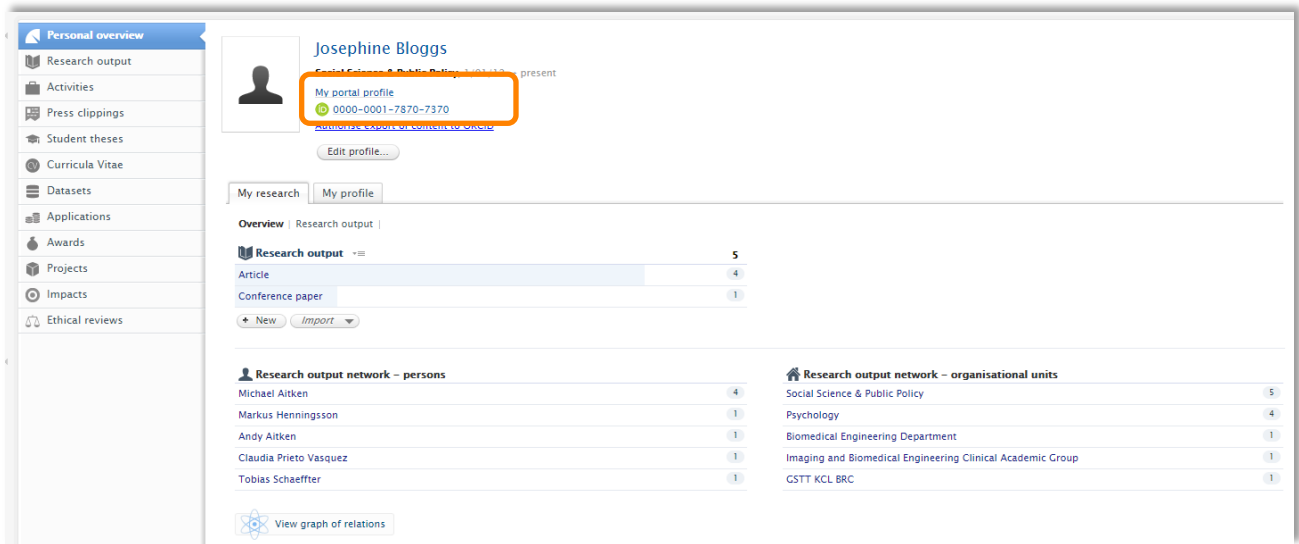
- First name(s):** Josephine
- Last name \*:** Bloggs
- Nationality:** Select nationality... (dropdown menu)
- Name variant:** Add name variant... (button)
- Title:** Add title... (button)
- Scopus author ID:** 55975120000 (with 'Scopus author ID' tag and 'Edit' link)
- ORCID:** 0000-0001-7870-7370 (with 'ORCID' tag, 'Last exported: 29/01/16 21:52', and 'Edit' link)
- Status:** ORCID for 'Josephine Bloggs' applied. (with green checkmark)

The user will also receive a verification email from ORCID that must be actioned in order to complete the registration process.

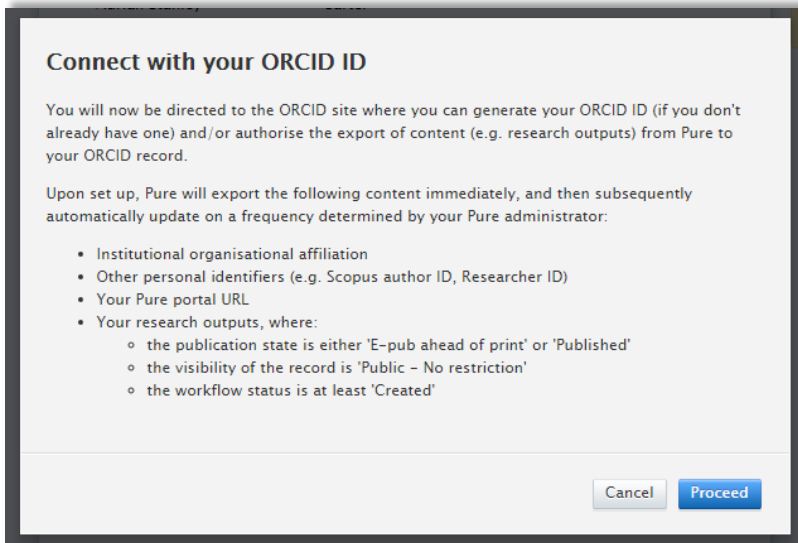
<sup>1</sup> If a user has a significant amount of content being exported to ORCID (e.g. >300 outputs, such that the export takes more than 10 seconds), the timestamp for the last time the export was performed will not be displayed

## 2. Users with ORCID ID already registered in Pure

To set up the export of content to ORCID, select 'Authorise export of content to ORCID' from the Personal overview screen or within the Person editor screen:

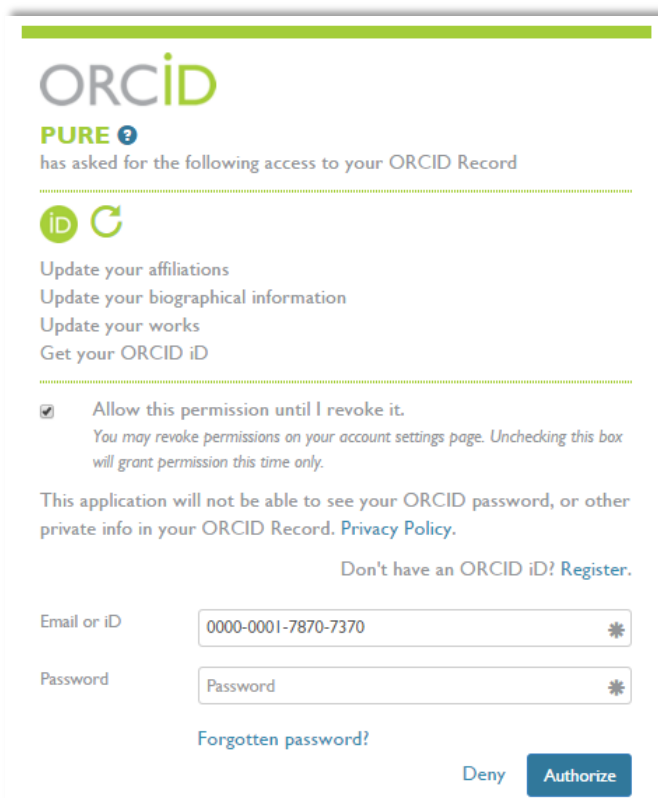


The user is then directed to an information screen advising what content will be exported:



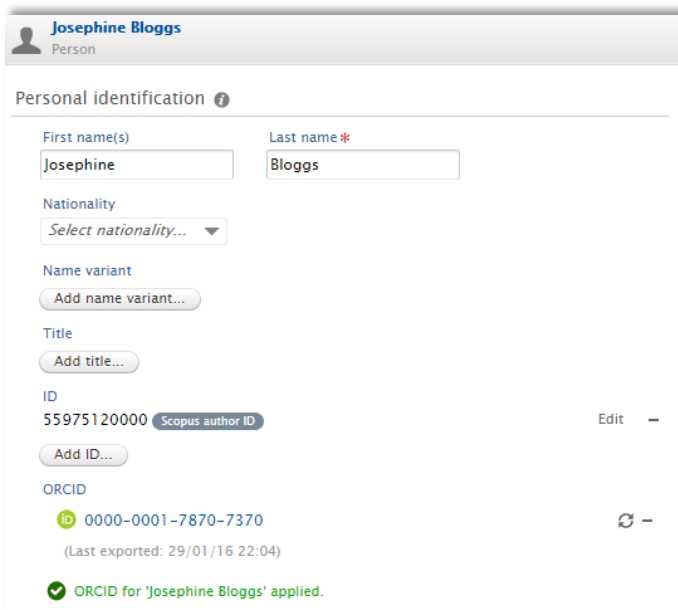
Note that whether the Pure portal URL is exported depends on the local configuration, and the effective workflow status of outputs to be exported is as per the local configuration.

Upon selecting 'Proceed', the user is directed to the ORCID authorization screen.





Following the authorization, the user will be re-directed to their Person editor screen, where it will be confirmed that the authorization was successful and the content was exported<sup>2</sup>. **Remember to save the record!**

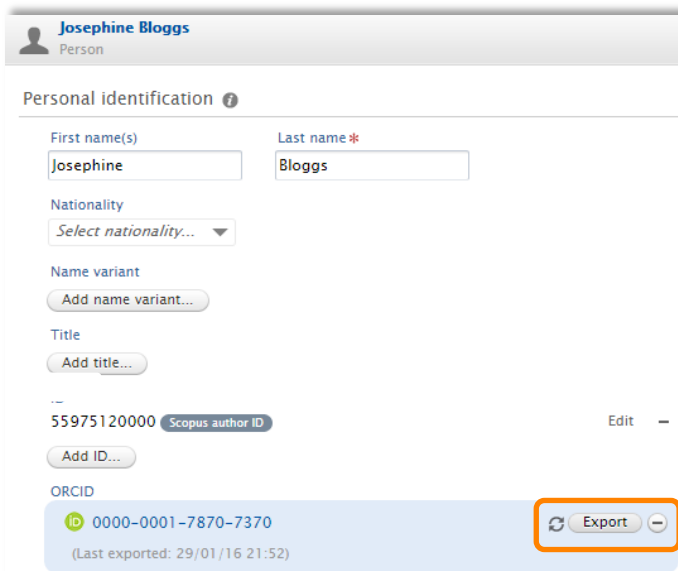


The screenshot shows the 'Person editor' interface for 'Josephine Bloggs'. The 'Personal identification' section includes the following fields and options:

- First name(s):** Josephine
- Last name \*:** Bloggs
- Nationality:** Select nationality... (dropdown menu)
- Name variant:** Add name variant... (button)
- Title:** Add title... (button)
- ID:** 55975120000 (Scopus author ID) with an 'Edit' link and an 'Add ID...' button.
- ORCID:** 0000-0001-7870-7370 (Last exported: 29/01/16 22:04) with a refresh icon and a checkmark indicating 'ORCID for 'Josephine Bloggs' applied.'

### 3. Export to ORCID following initial set-up

Following the initial set-up of the authorization to export content from Pure to ORCID, the user can initiate a manual export of content to ORCID from the Person editor screen.



This screenshot is identical to the previous one, but with an orange box highlighting the 'Export' button located next to the ORCID ID field.

Exports to ORCID will also run automatically, as per the frequency defined by the Pure Administrator via the settings for the "Update ORCID With Pure Data Job".

<sup>2</sup> If a user has a significant amount of content being exported to ORCID (e.g. >300 outputs, such that the export takes more than 10 seconds), the timestamp for the last time the export was performed will not be displayed

#### 4. Editing content in ORCID

Users can add and edit content directly in ORCID, with the following items to note:

- The user can edit the privacy settings of individual items within ORCID. If these are changed directly in ORCID, these are respected and maintained with subsequent exports from Pure.
- Where duplicates exist (e.g. an output record already exists in ORCID and an output with the same identifier (e.g. DOI) is subsequently included in an export from Pure), ORCID deals with these by grouping them together, so the visual interface of the ORCID record does not display a duplicate. Works from the same source with the same identifier can not be added to a record (so duplicates within Pure won't be exported).
- The export to ORCID includes only outputs where Visibility = Public. However, where a user has restricted the visibility of the output record directly in ORCID and subsequently changes the visibility of the record in Pure to  $\neq$  Public, the output will continue to appear in ORCID (with restricted visibility) as we cannot remove content in ORCID that the user has restricted access to.
- If a user deletes an output record directly in ORCID, the next time the individual's content is exported to ORCID the output will re-appear. The only way a user can 'remove' content from ORCID that is exported from Pure is to restrict its visibility directly in ORCID.
- A user can delete an 'Other ID' (e.g. Scopus author ID) exported from Pure directly in ORCID. However, the next time the individual's content is exported from Pure, the deleted ID will re-appear.

#### 5. Revoking authorization for Pure to export content to ORCID

If a user no longer wants to export their content from Pure to ORCID, they can revoke the authorization from within their ORCID account, under Account Settings.

The screenshot displays the ORCID 'Account settings' page. At the top, there are navigation tabs: FOR RESEARCHERS, FOR ORGANIZATIONS, ABOUT, HELP, and SIGN OUT. Below these are sub-tabs: MY ORCID RECORD, INBOX (6), ACCOUNT SETTINGS (selected), DEVELOPER TOOLS, and LEARN MORE. The user's name 'Josephine Bloggs' and ORCID ID 'sandbox.orcid.org/0000-0001-7870-7370' are visible. The 'Account settings' section includes links to edit: Email and contact preferences, ORCID inbox notifications, Password, Privacy preferences, Security question, and Close account. The 'Trusted organizations' section contains a table with the following data:

ORCID record	Approval date	Access type
PURE <a href="https://www.elsevier.com/solutions/pure">https://www.elsevier.com/solutions/pure</a>	2016-01-29	Update your affiliations Get your ORCID iD Update your biographical information Update your works

A 'Revoke Access' button is located next to the PURE entry.

Following access being revoked, the next time an export is attempted (either 'on-demand' or via the Job), Pure will attempt the export but will be informed by ORCID that the authorization has been revoked. Pure will not attempt again (unless the User re-authorises the export of content from Pure to ORCID).