

## ORCID : Functionality for Personal Users

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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':

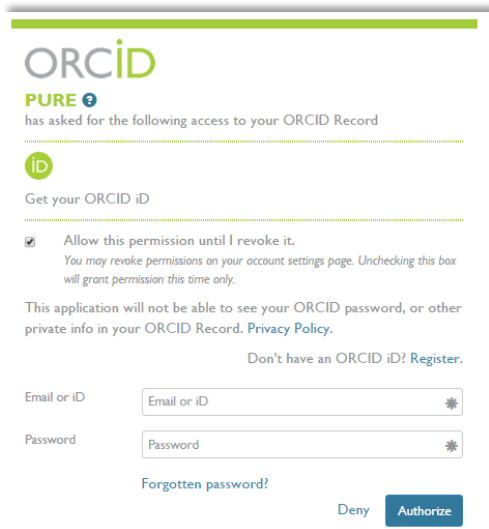
The screenshot shows the 'Personal identification' section of a user profile editor for 'Josephine Bloggs'. The fields include 'First name(s)' (Josephine), 'Last name\*' (Bloggs), 'Nationality' (Select nationality...), 'Name variant' (Add name variant...), 'Title' (Add title...), and 'ID' (55975120000, Scopus author ID, Add ID...). The 'ORCID' section is highlighted with a red box and contains the option 'Create or Connect your ORCID ID'. Below this are sections for 'Profile photos' (Add file...) and 'Links' (Add link...).

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

The dialog box is 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'. At the bottom left, there is a small icon and the text 'Create or Connect your ORCID ID'.

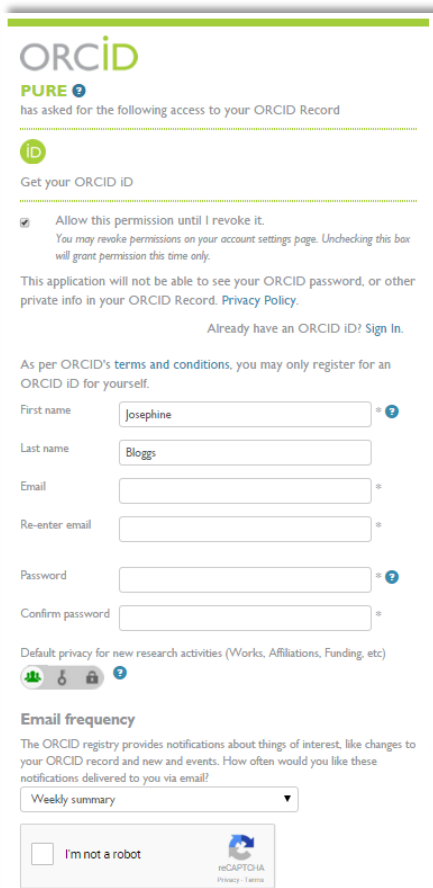
Upon selecting 'Proceed', the user is directed to the ORCID authorization screen.

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



The screenshot shows the ORCID authorization interface. At the top, it says "ORCID PURE" and "has asked for the following access to your ORCID Record". Below this, there is a section for "ID" with the heading "Get your ORCID iD". A checkbox is checked, labeled "Allow this permission until I revoke it." with a sub-note: "You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only." Below this, a warning states: "This application will not be able to see your ORCID password, or other private info in your ORCID Record. Privacy Policy." A link "Don't have an ORCID iD? Register." is present. There are two input fields: "Email or iD" and "Password", both with eye icons. A "Forgotten password?" link is below the password field. At the bottom right, there are "Deny" and "Authorize" buttons.

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



The screenshot shows the ORCID registration interface. At the top, it says "ORCID PURE" and "has asked for the following access to your ORCID Record". Below this, there is a section for "ID" with the heading "Get your ORCID iD". A checkbox is checked, labeled "Allow this permission until I revoke it." with a sub-note: "You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only." Below this, a warning states: "This application will not be able to see your ORCID password, or other private info in your ORCID Record. Privacy Policy." A link "Already have an ORCID ID? Sign In." is present. Below this, a note says: "As per ORCID's terms and conditions, you may only register for an ORCID iD for yourself." There are several input fields: "First name" (filled with "Josephine"), "Last name" (filled with "Bloggs"), "Email", "Re-enter email", "Password", and "Confirm password". Below these is a section for "Default privacy for new research activities (Works, Affiliations, Funding, etc)" with three radio buttons and a help icon. Below that is an "Email frequency" section with a dropdown menu set to "Weekly summary". At the bottom, there is a "I'm not a robot" checkbox and a reCAPTCHA logo.

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!**

Josephine Bloggs  
Person

Personal identification ⓘ

First name(s) Last name \*

Josephine Bloggs

Nationality  
Select nationality...

Name variant  
Add name variant...

Title  
Add title...

ID  
55975120000 Scopus author ID Edit -  
Add ID...

ORCID  
0000-0001-5398-032X -  
ORCID for 'Josephine Bloggs' applied.

Profile photos  
Add file...

Links  
Add link...

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.

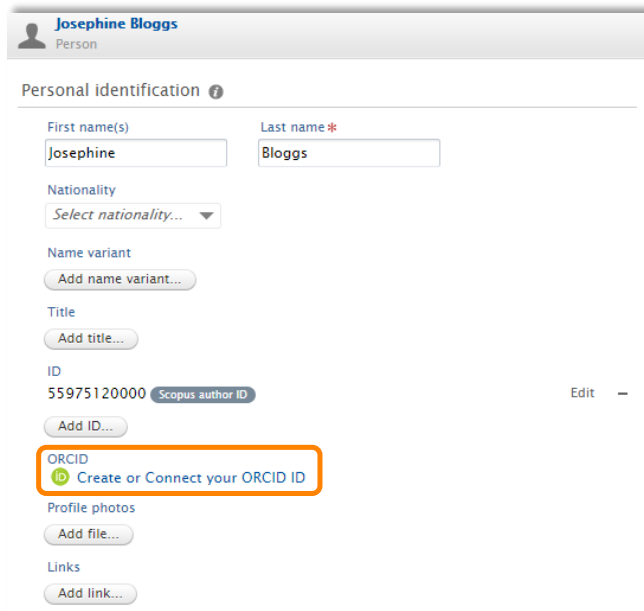
Only Personal Users (or their trusted users in Pure) can authorize the export of content from Pure to ORCID.

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 or student)
- Pure Portal URLs (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\*

Josephine Bloggs

Nationality  
Select nationality...

Name variant  
Add name variant...

Title  
Add title...

ID  
55975120000 Scopus author ID Edit —

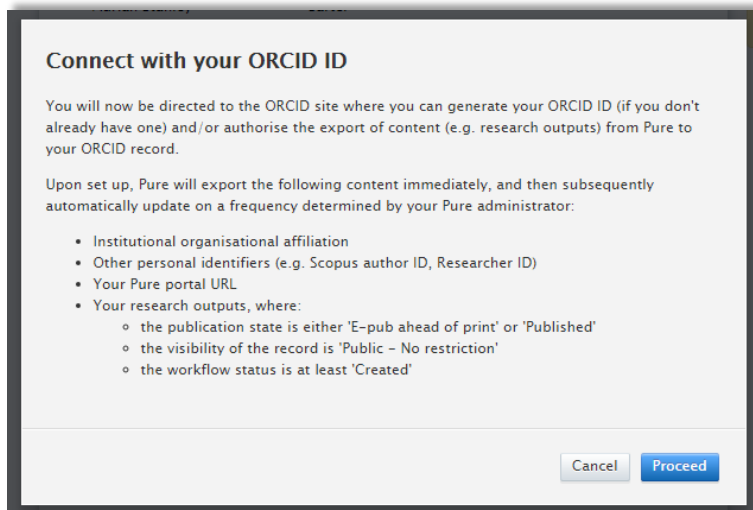
Add ID...

ORCID  
id Create or Connect your ORCID ID

Profile photos  
Add file...

Links  
Add link...

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'

Cancel Proceed

Note that whether portal URLs are 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.

ORCID  
PURE  
has asked for the following access to your ORCID Record

**iD**

Get your ORCID iD  
Update your biographical information  
Update your affiliations  
Update your works

Allow this permission until I revoke it.  
You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

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

Email or iD

Password

[Forgotten password?](#)

[Deny](#) [Authorize](#)

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

ORCID  
PURE  
has asked for the following access to your ORCID Record

**iD**

Update your affiliations  
Update your biographical information  
Update your works  
Get your ORCID iD

Allow this permission until I revoke it.  
You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Already have an ORCID iD? [Sign In](#).

As per ORCID's [terms and conditions](#), you may only register for an ORCID iD for yourself.

First name

Last name

Email

Re-enter email

Password

Confirm password

Default privacy for new research activities (Works, Affiliations, Funding, etc)

**Email frequency**  
The ORCID registry provides notifications about things of interest, like changes to your ORCID record and new and events. How often would you like these notifications delivered to you via email?

## Notes:

- Un-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 update from Pure to ORCID generates a message 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!**

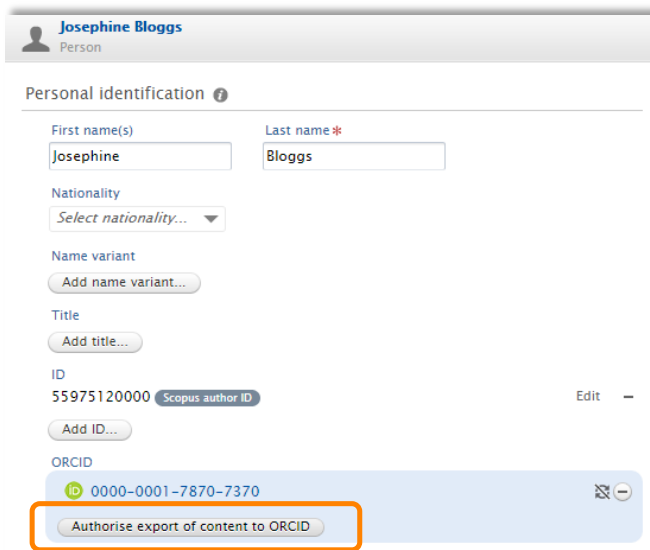
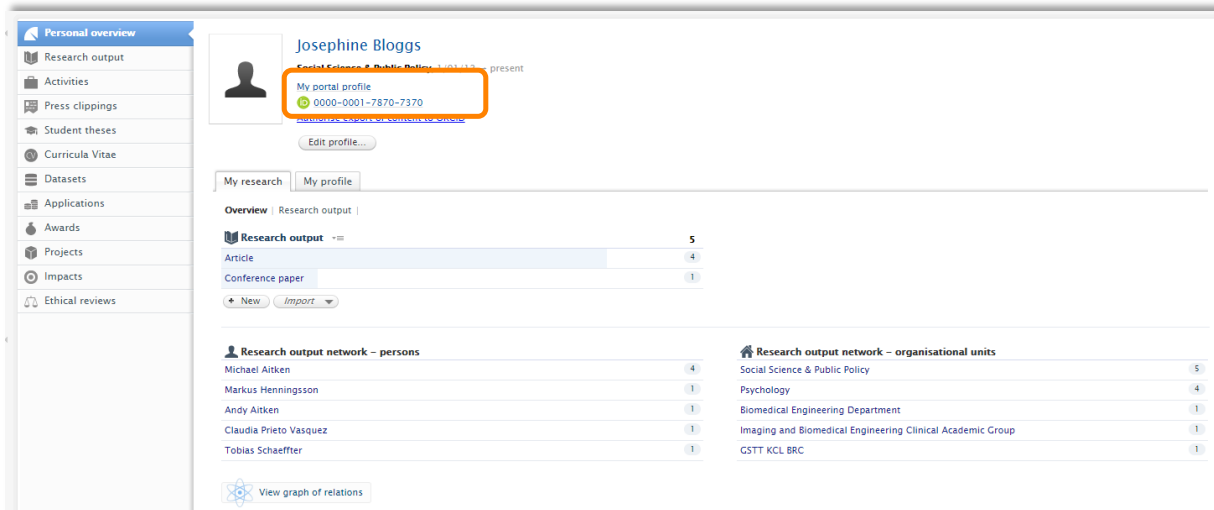
The screenshot shows the 'Person' editor interface for 'Josephine Bloggs'. The 'Personal identification' section includes fields for 'First name(s)' (Josephine) and 'Last name \*' (Bloggs). Below these are 'Nationality' (a dropdown menu with 'Select nationality...' selected), 'Name variant' (with an 'Add name variant...' button), and 'Title' (with an 'Add title...' button). The 'Scopus author ID' is listed as 55975120000, with an 'Add ID...' button and an 'Edit' link. The 'ORCID' section shows the ID 0000-0001-7870-7370, with a 'Last exported' timestamp of 29/01/16 21:52 and a refresh button. A green checkmark and message confirm that 'ORCID for 'Josephine Bloggs' applied.'

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

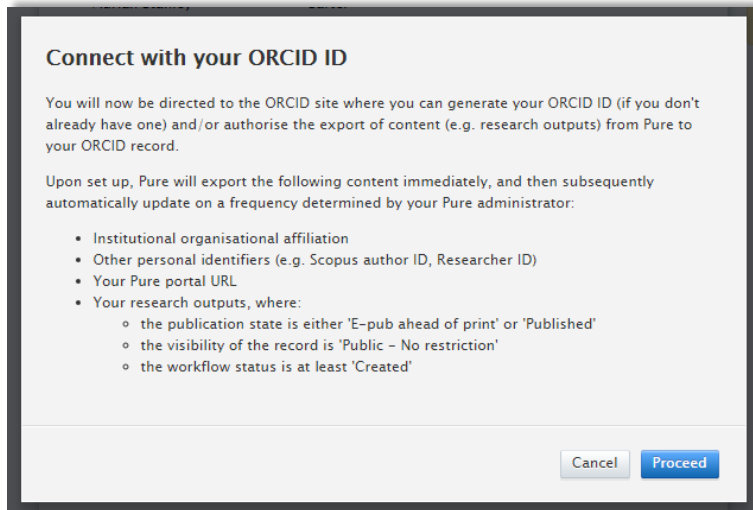
<sup>1</sup> If a user has a significant amount of content being exported to ORCID (e.g. >300 outputs, such that the export takes more than 10 seconds), the timestamp for the last time the export was performed will not be displayed

## 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:

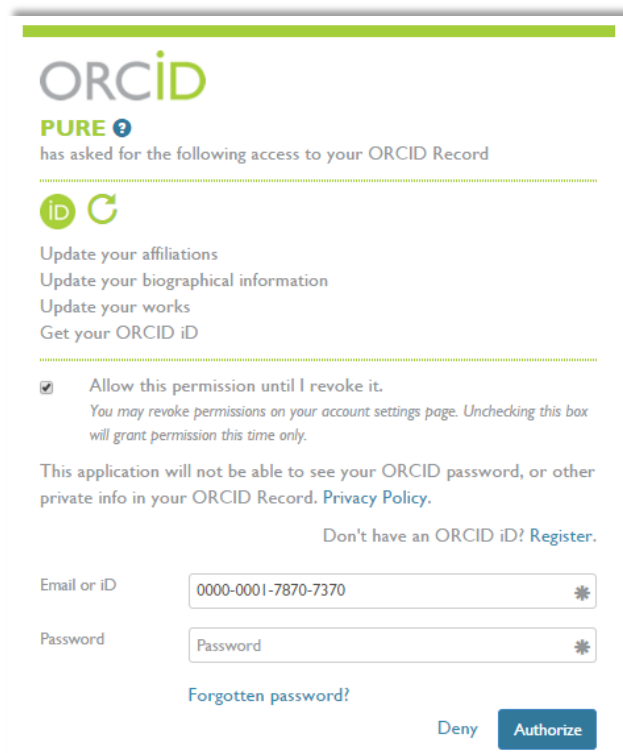


The user is then directed to an information screen advising what content will be exported:



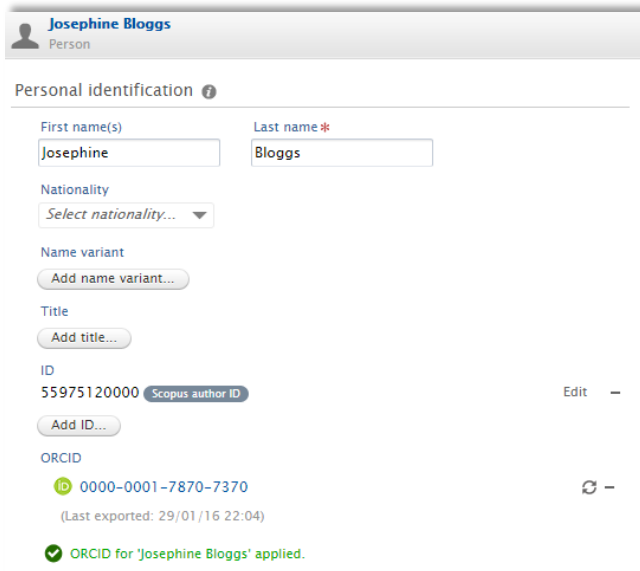
Note that whether portal URLs are exported depends on the local configuration, and the effective workflow status of outputs to be exported is as per the local configuration.

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





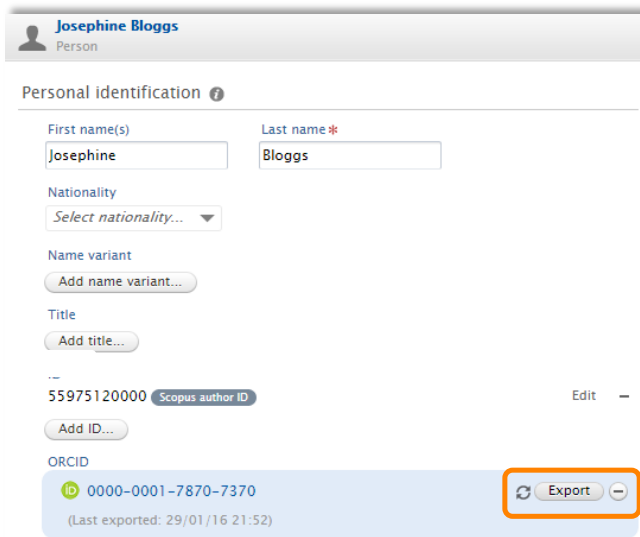
Following the authorization, the user will be re-directed to their Person editor screen, where it will be confirmed that the authorization was successful and the content was exported<sup>2</sup>. **Remember to save the record!**



The screenshot shows the 'Person editor' interface for Josephine Bloggs. The 'Personal identification' section includes fields for 'First name(s)' (Josephine) and 'Last name\*' (Bloggs). Below these are fields for 'Nationality' (with a dropdown menu), 'Name variant' (with an 'Add name variant...' button), and 'Title' (with an 'Add title...' button). The 'ID' section shows a Scopus author ID of 55975120000 with an 'Add ID...' button. The 'ORCID' section shows an ORCID ID of 0000-0001-7870-7370 with a refresh icon and a green checkmark indicating that the ORCID for 'Josephine Bloggs' is applied. The last export timestamp is 29/01/16 22:04.

### 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 one above, but with a red box highlighting the 'Export' button in the ORCID section. The 'Export' button is located to the right of the ORCID ID and the last export timestamp.

When this manual, 'on-demand' export of content is actioned, all content is re-exported to ORCID, regardless of when it was last updated.

<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

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”. This automatic export to ORCID will only export content that has been modified since the last export (unless specifically overridden by the Pure Administrator).

#### 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 ≠ 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 shows the ORCID account settings page for Josephine Bloggs. The page is divided into several sections:

- Account settings:** A list of settings with 'Edit' links:
  - Email and contact preferences
  - ORCID inbox notifications
  - Password
  - Privacy preferences
  - Security question
  - Close account (Close this ORCID record...)
- Trusted organizations:** A section explaining that users can allow permission for their ORCID Record to be updated by a trusted organisation. It includes a table of trusted organizations:
 

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 visible 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).