




ORCID US Community Call - ORCID in Publishing and Peer Review

- **When:** Wed. July 26 at 1-2pm Eastern/ 12-1pm Central/ 11am-12pm Mountain/ 10-11am Pacific
- **Recording:** <https://vimeo.com/849173245>
- **Slides:**  2023-07-26 Community Call - ORCID in Publishing and Peer Review.pptx
- **Helpful resources:**
 - Requiring ORCID in publishing workflows:
<https://info.orcid.org/requiring-orcid-in-publications/>
 - ORCID workflows:
 - Journals:
<https://info.orcid.org/documentation/workflows/integrating-orcid-into-your-journal-workflow/>
 - Books: <https://info.orcid.org/documentation/workflows/books-workflow/>
 - Preprints:
<https://info.orcid.org/documentation/workflows/preprint-workflow/>
 - Peer Review:
<https://info.orcid.org/documentation/workflows/peer-review-workflow/>
 - Adding publications to ORCID via Crossref and DataCite:
 - Crossref - claiming past works: use the Crossref Search and Link wizard within ORCID:
<https://support.orcid.org/hc/en-us/articles/360006973653-Add-works-by-direct-import-from-other-systems>
 - Crossref - automatically having new publications added to ORCID:
<https://support.orcid.org/hc/en-us/articles/360006971293-Auto-updates-in-third-party-systems-Crossref>
 - DataCite - claiming past works: use DataCite Commons (see slides 6-9):
 How to get automatic updates to ORCID via DataCite
 - DataCite - automatically having new works added to ORCID: authorize the DataCite search and link wizard - see slides 1-5:
 How to get automatic updates to ORCID via DataCite
 - Using the ORCID Works “Search and Link Wizards”
<https://support.orcid.org/hc/en-us/articles/360006973653-Add-works-by-direct-import-from-other-systems>
 - Metadata in the ORCID works section:
<https://support.orcid.org/hc/en-us/articles/360006971353-Metadata-in-the-Works-section>
 - ORCID Peer Review metadata and other info:
<https://support.orcid.org/hc/en-us/articles/360006971333-Peer-Review>
- ORCID US Community Code of Conduct: <https://orcidus.lyrasis.org/events/>

Attendees: ~52 attendees

- Host: Paolo P. Gujilde (ORCID US Community Specialist, Lyrasis)
- Host: Sheila Rabun (Program Leader for PID Communities, Lyrasis)

- Host: John Aspler (PID Community Manager, CRKN)
- Presenter: Tomasz Mrozewski, York University
- Presenter: Jeremiah Mercurio, Columbia University
- Attendee: Pascal Calarco, University of Windsor
- Attendee: Anne Summerhays, Public Health Agency of Canada
- Attendee: Rachel Gendron, Public Health Agency of Canada
- Attendee: Jack Young, McMaster University
- Attendee: Kristin Hoffmann, University of Western Ontario
- Attendee: Laurel Crawford, Johns Hopkins
- Attendee: Sonya Betz, University of Alberta
- Attendee: Sarah Shaughnessy, University of Alberta
- Attendee: Laura Burtle, Georgia State University
- Attendee: Jeffrey Demaine, McMaster University
- Attendee: Inba Kehoe, U of Victoria
- Attendee: Kristen LaBonte, University of California, Santa Barbara
- Attendee: Mathieu Pigeon, Érudit
- Attendee: Angela Clark, University of Miami, Rosenstiel School
- Attendee: Joanne Hélovry, Johns Hopkins
- Attendee: Jacob White
- Attendee: Joseph Kraus, Colorado School of Mines
- Attendee: Maude Laplante-Dubé, Université Laval
- Attendee: Elizabeth Kalbfleisch, Canadian Association of Research Libraries
- Attendee: Treasa Bane, Washington University in St. Louis
- Attendee: Ellen Dubinsky, University of Arizona
- Attendee: Marian Davies, University of Waterloo
- Attendee: Leigh-Ann Butler, University of Ottawa
- Attendee: Matthieu Fortin, Fonds de recherche du Québec
- Attendee: Naomie Djengue, Fonds de recherche du Québec
- Attendee: Beth Whipple, Indiana University School of Medicine
- Attendee: Gilda Villarreal, Ottawa Hospital Research Institute, Canada

Agenda:

- Welcome (Paolo)
- Overview of how ORCID fits into publishing and peer review:
 - John
 - Interoperability diagram - roles of different stakeholders
 - Publishers using ORCID
 - Universities and other groups publishing
 - Direct: ORCID collected from author(s) and/or reviewers
 - Displaying ORCID iDs on publication
 - Sheila
 - Indirect: ORCID iD in DOI metadata (written via Crossref or DataCite)
 - Work written to ORCID
 - Peer review written to ORCID

- Publishing or Peer Review platforms that have an ORCID API integration built in:
 - **Editorial Manager** (sign in with ORCID, collect ORCID iD for author, co-author, and reviewer, display ORCID iD, [writes peer review](#)) Documentation:
 - https://www.ariessys.com/wp-content/uploads/ORCID-Solicitation-FAQ_8.5x11.pdf
 - <https://www.ariessys.com/blog/proactive-solicitation-of-orcid-ids-to-increase-adoption-within-scholarly-publishing/>
 - **eJournal Press** (sign in with ORCID, collect ORCID iD for author, co-author, and reviewer, display ORCID iD, [writes peer review](#)) Documentation: https://www.ejpress.com/EJPress_Capabilities_2020.pdf
 - **Janeway** (sign in with ORCID, collect ORCID iD, display ORCID iD)
 - **OJS and OPS 3.1.2+** (sign in with ORCID, collect ORCID iD for author, co-author, and reviewer, display ORCID iD, writes publication and peer review (3.3+)) Documentation: <https://docs.pkp.sfu.ca/orcid/en/>
 - **Publons** (sign in with ORCID, collect ORCID iD from author, co-author, and reviewer, display ORCID iD, writes Researcher ID, peer review, and works) Documentation: https://clarivate.libguides.com/ld.php?content_id=52861820
 - **ScholarOne** (sign in with ORCID, collect ORCID iD from author, co-author, and reviewer) Documentation: https://clarivate.com/webofsciencegroup/wp-content/uploads/sites/2/dlm_uploads/2019/10/ScholarOne-Manuscripts-Admin-Guide.pdf
- Case studies/demos:
 - ORCID in OJS publishing - York University (Canada)
 - ORCID in OJS peer review - Columbia University (US)
- Q & A

Notes:

- Publishers are part of the ORCID ecosystem along with funders, universities, etc.
- Publishers role is to write publications and peer review to authors/reviewers' ORCID records
- Authors need to connect their authenticated ORCID iD with the publication/publisher - the author will be prompted to connect/authenticate their ORCID iD during the manuscript submission process or during account registration (this ORCID authentication happens through a process called OAuth)
- The author can also grant permission for the publisher to update their ORCID data via the OAuth process

- Co-authors can also authenticate their ORCID iD typically through an email process - co-author receives an email prompting them to connect their ORCID iD with the publisher/publication
- Authenticated ORCID iDs are then displayed on the publication with the author's name - presence of the green ORCID iD icon means that the author connected their authenticated ORCID iD
- Some publishers add authenticated ORCID iDs in the DOI metadata and these can be pushed to ORCID records via Crossref and DataCite
- Authors, co-authors, and contributors can also use Search and link wizards in ORCID specifically Crossref and DataCite to add their publications to ORCID record
- Peer review activity can be added to ORCID by publishers, if available
- Publishing software platforms with built-in ORCID integrations have different functionalities
- Publishing workflow in OJS:
 - York University has several journals
 - Most active journals have 38 authors total with 18 connecting ORCID iD, and 24 total authors with 20 ORCID iDs connected
 - If you want to use the ORCID plugin for OJS, you need to get your ORCID member API keys, process will vary depending on how many journals, etc. - see documentation: <https://docs.pkp.sfu.ca/orcid/en/> - documentation also covers how the plugin works and how to set it up...
- Peer review workflow in OJS:
 - Columbia University one of the first institutions using this, they have several active journals
 - Using peer review functionality in student undergrad journals
 - See ORCID plugin documentation for details on setting up peer review: <https://docs.pkp.sfu.ca/orcid/en/> - city and state information, and ISSN need to be filled out for the journal
 - Once an article has been added to submission queue, you can add reviewers info for that article - use the email template to request review. You can select review type (open or blind), which has an impact on what shows up on the ORCID entry
 - Reviewers add ORCID iD in their OJS profile
 - (side note) Columbia will be mandating ORCID for all OJS contributors soon
 - After the review is complete, you can thank you the reviewer, which writes the peer review activity to the ORCID record of the reviewer
 - Can retrospective reviewer credit be given? Yes, there are some workarounds

Questions:

- what indicates whether an entry in an orcid record gets a green check?
 - the green check means that the entry was added to the ORCID record by an organization via the ORCID member API, as opposed to the user adding the entry to their own record

- can you go over the crossref notification again? I thought it was automatic once you authenticate through search & link?
 - <https://support.orcid.org/hc/en-us/articles/360006971293-Auto-updates-in-third-party-systems-Crossref>
- is the 'preferred source' something that can be set at an individual work/item level? Or is there a built in hierarchy?
 - Preferred source can be controlled individually. ORCID will automatically group works together if they have the same DOI or common identifiers. You can also group work together manually. Here's the documentation:
<https://support.orcid.org/hc/en-us/articles/360006894774-Group-multiple-versions-of-the-same-work-together>