Speaker Notes - ORCID 101 slide deck

1. Welcome. In this session you will learn about ORCID, which stands for the Open Researcher and Contributor Identifier

2. For learning outcomes, after this session, you should:
   - Understand what ORCID is and how it can benefit you
   - Have your own ORCID iD and know how to populate data in your ORCID record
   - Recognize the benefits of authorizing organizations as trusted parties
   - [Add your organization's goal/s, if available (e.g. connecting with your integration)]

3. ORCID is an identifier for individuals, which is needed because names are tricky, there can often be more than one person with the same name, or one person who uses multiple name variations over the course of their career. In this illustration, we are asking Sofia Garcia to stand up, and 4 people are standing, so that means there are 4 people with the same name. Let's say one of these people recently published a groundbreaking article on dinosaur DNA. How do we know who is who? (optional: play video (~4 min.: What is ORCID? on Vimeo)

4. ORCID helps to solve the problem of name ambiguity by providing a free service for you to register for your own unique, persistent identifier, known as an ORCID iD, to distinguish yourself throughout your career despite changes in name, career, location, or discipline, and other variables. Despite these changes, your ORCID iD stays the same.

5. In this example, we are looking at an ORCID iD for one of the Sofia Garcia's that we saw on the last slide. While Sofia may have the same name as others, her ORCID iD is a completely unique 16 digit number that looks like a URL. You can also see that Sofia has used multiple different versions of her name, in the "Also known as" section.

6. If we were to click on the ORCID iD link, we would be taken to Sofia's ORCID record, which looks something like this. This slide shows an example of a blank ORCID record, demonstrating the different types of information that Sofia can store on her record in addition to her name. These fields include (along the left side: Name(s), Country, Keywords (associated with your work, activities, and interests), Websites, Other IDs, and Emails. You have the option to include a Biography, and information about your current and past employment, education, qualifications, membership and service, any grant funding you have received, works you have produced, and potentially any peer review activity you have been involved in. The ORCID record is always evolving, so look out for additional fields to be added in the future.

7. The visibility settings in ORCID determine who can see the data that you have included on your ORCID record. The options for visibility are: everyone, trusted parties, and only me. You can control the visibility settings for your entire ORCID profile by clicking on the account setting under your name at the top right corner area of the ORCID record page. Then, clicking on visibility settings.

8. You can also control the visibility settings of each of the individual entries in your ORCID record by clicking the "visibility settings" drop-down menu. Again, there are three visibility options available: "Everyone," indicated by the green people icon, means that information in ORCID with this setting is visible to everyone on the web.

9. On the flip side, data in ORCID can be set to "only me," indicated by the red lock, which means that the only person who will ever see this data is you, as the individual. ORCID respects your privacy and you have full control over your data.

10. And finally we have the "trusted parties" option indicated by the yellow key. Data in your ORCID record set to "trusted parties" is only visible by organizations and individuals that you have authorized as trusted parties in ORCID.

11. Trusted organizations are typically research institutions, publishers, or funding agencies that have integrated ORCID with their systems, such as a central identity management or profiles system, HR system, research information and reporting systems, publishing platforms and repositories, and grant management systems for example. It's a good idea to connect your ORCID with as many of your affiliated organizations as possible, because you can often save time by letting these organizations add information to your ORCID record for you! Connecting with trusted organizations increases the chances that your contributions and works will be linked to you, recognized, and credited. The example shown here is from the State University, where ORCID is integrated into the institutional repository, allowing an individual to authorize the University as a trusted party to add works information to their ORCID record for them. As you can see, State University is listed as the source of this work entry. Organizations can not add information to your ORCID record unless you give them permission.

12. To authorize an organization as a trusted party, the organization must ask you for permission to connect with your ORCID iD. When you go to interact with a system that is integrated with ORCID, you will be prompted to authorize permission for the institution to connect with your ORCID iD and record. In this example, the organization is asking for permission to add information to your ORCID record for you, as we saw in the State University example, and to read any data on your record that has been set to "trusted parties" only.

13. Once you connect your ORCID iD with an organization in this way, you can see those organizations appear in the account settings page of your ORCID record. Navigate to your account settings by logging in to your ORCID record, clicking on your name in the top right corner and selecting "Trusted Parties" from the dropdown menu. You will see your trusted organizations listed, with the name of the organization or platform, the date you connected your ORCID iD, and the permissions that you granted to each organization to interact with the information in your ORCID record. (More about trusted parties: https://support.orcid.org/hc/en-us/articles/360006973893-Trusted-organizations)

14. In the same "Trusted Parties" page in your ORCID record, you can also designate individuals as trusted parties by searching for a trusted person's ORCID iD, email

address, or name. Whomever you authorize as a trusted individual will be able to add data to your ORCID record, make changes, and see data set to "trusted parties" visibility.

15. ORCID is used across the globe and works in multiple languages, including diacritics as you see here. Over 9 million people around the world have an ORCID iD.

16. ORCID is used by major research institutions, publishers, and funders across the globe. Over 70 publishers are now requiring ORCID iDs with manuscript submissions, and grant funders are increasingly requiring ORCID iDs for grant proposals as well. By including your ORCID iD in publishing and funding workflows, you can ensure that your work and contributions will be accurately linked to you, and not accidentally credited to someone else. Research institutions across the globe are also increasingly using ORCID. [Insert information about how ORCID is being used at your institution.] (Links to more info: Publishers requiring ORCID: https://orcid.org/content/requiring-orcid-publication-workflows-open-letter, Funders requiring ORCID: https://orcid.org/organizations/funders/policies, US Research Institutions using ORCID: https://orcid.org/members/001G000001wND7XIAW-lyrasis)

17. After an initial time investment to set up your ORCID record (it's free to register), you can save time later by using your ORCID iD to:
    ●Sign in to various systems (journal article submission, grant application, research information systems, etc.)
    ●Transfer your information to employers, funders, and publishers via ORCID
    ●Use the "printable version" to easily and quickly create a CV or resume
    ●You can also allow your trusted organizations to add relevant information to your ORCID record for you, so you can save time!
So, as you move through research-related workflows, keep an eye out for the ORCID iD logo and use your ORCID iD whenever possible.

18. This tweet shows an example of a researcher saving time via ORCID. The researcher says, "Just got an ORCID notification about the publication of a new article a good couple of hours before the journal notification arrived. Get an ORCID iD everyone - it's free, easy to do, and works brilliantly!"

19. To set up your own ORCID iD to your advantage, you will need to:
    1) Register to get your own ORCID iD number
    2) Add as much biographical information as you want to your ORCID record, keeping in mind that the more complete your ORCID record is, the better it will work for you
    3) Connect with your affiliated organizations (if they have an ORCID integration) to authorize them as "trusted parties" (if your institution has an integration, let your audience know that you will go through the process of connecting later in this presentation. See slide 33)
    4) Go to orcid.org/register now and register for your ORCID iD.

20. It only takes about 30 seconds to register for your ORCID iD. In the registration form, there are three steps: first, you just need to fill out your first and last name, primary email address, and an additional email address.

21. In the second step, you will set a password, and select your notification settings - ORCID will send you notifications if one of your trusted parties makes a change to your ORCID data, such as adding a publication to your ORCID record. Also, make sure to note the email address and password that you have used to set up your account, so you can access your ORCID record later.

22. Finally, you will set your default visibility settings, agree to ORCID's terms of use, and confirm that you are not a robot. Once you click "register," ORCID will send you an email to verify your account. You must verify your account before you can start adding data to your ORCID record.

23. At the most basic level, it's recommended that you at least fill out your name and any names you have used over the course of your career, as well as your most recent employment, education, and works information. It should take about 10 minutes to add this initial information to your ORCID record. You can always go back and add more later. We will cover best practices for adding works and employment and education affiliations in the next few slides.

24. Now that we all have our ORCID iDs, we can fill in any information that we want to keep in our ORCID record. There are a few specific things I want to point out for the purposes of this training. The first is on adding works and funding information to your ORCID record. ORCID has what are called "Search & Link Wizards" that allow you to search within several databases to find your works and/or funding that can be automatically added to your ORCID record without you having to type them in manually. When adding works and funding, try to use the search and link wizards as much as possible. If for whatever reason you can not find your data in the search and link wizards, when entering works manually, try to always include a DOI if possible to prevent duplicates if the same work is added by a publisher to your record later on.   Note: the more complete your ORCID record is, the better it will work for you
    ○ See instructions for adding works: https://support.orcid.org/hc/en-us/articles/360006973133-Add-works-to-your-ORCID-record)

25. To see how the search and link wizards work, we will go through an example from CrossRef Metadata Search.

26. When we click on the CrossRef Metadata Search search and link wizard, an authorization screen will pop us, asking for permission to, in this case, add and update information on the ORCID record, as well as add and update research activities like works. By clicking "authorize," we are authorizing CrossRef as a "trusted party."

27. Once you Authorized CrossRef, you will then be taken to the CrossRef platform and your name appears in the search box. You can search for your works by name, keywords, and DOIs.

28. You can then look at the results and click "Add to ORCID record" for any works that you want to add. It will take a few seconds to minutes for the information to show up on your ORCID record, but it will show up, and then you don't have to worry about entering it manually yourself.

29. Once the entry does show up on your ORCID record it will look like this. Notice that CrossRef Metadata Search is listed as the source of the information. You will also see CrossRef listed as a trusted organization in the account settings tab of your ORCID record.

30. (Optional slide if your audience is not from a science discipline:) Finally, I want to point out that ORCID can be useful for all disciplines and tracking all manner of contributions, not just research papers in the hard sciences. For example, when adding a work to an ORCID record, there is an option specifically for "Artistic/Performance" as well as data sets, inventions, lectures or speeches, research techniques, software, and other types of contributions. ORCID is working on expanding the community to include an even more diverse representation of works.

31. Another tip that I want to point out is for adding institutional affiliations like Employment and Education. When you go to manually add an employer or school to your record, start typing the name of the organization and you will see a drop-down menu appear with a list of institution names. If possible, try to always use the dropdown to select the institution name for your record and select the top-level organization name. This will ensure that your affiliated institution names will appear in a standard format with no typos, and the institutional identifiers will appear on your ORCID record. From here, go ahead and add as much info to your ORCID record as you would like. Again, remember that the more info you have on your ORCID record, the more useful it will be for you in the future.
    - ●See instructions for adding education: https://support.orcid.org/hc/en-us/articles/360006973933-Add-an-education-or-qualification-to-your-ORCID-record
    - ●See instructions for adding employment: https://support.orcid.org/hc/en-us/articles/360006894834-Add-employment-information-to-your-ORCID-record

32. As a researcher, once you have filled in your ORCID record and continue to authorize organizations as trusted parties connected to your ORCID record, you can use ORCID to distinguish yourself from other researchers, manage your reputation and research impact, get credit for your research, contributions, and affiliations, and save time on data entry for funding, publishing, and research reporting workflows.

33. (Note: Only use this slide if your institution has an ORCID integration.) We have an ORCID integration here at [name of your institution]. You can register for an ORCID iD and connect with [institution] at the same time as a "trusted party" by going to [URL of your integration]. (Take some time here to explain the integration and encourage researchers to connect in this way. Audience then completes the Create or Connect ORCID process through your institution. They will be prompted to register if they do not already have an ORCID iD.)

34. (On this slide, insert your ORCID website or LibGuide as well as the email address for a local person who can help with ORCID questions.) If you have any questions about ORCID or your ORCID record moving forward, please feel free to contact [person]. You can also contact ORCID support at support@orcid.org. Thank you!