BETTER TOGETHER
WITH DSPACE-CRIS & EPRINTS

19 SEPTEMBER 2019

GABRIELA MEJIAS
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Our guest speakers

Andrea Bollini
4Science

Will Fyson
Eprints Services

Rory McNicholl
Co-Sector
Why ORCID?

One of the crucial reasons we need @ORCID_Org
ORCID’s Vision is a world where all who participate in research, scholarship, and innovation are uniquely identified and connected to their contributions and affiliations across time, disciplines, and borders.
What is ORCID?

• ORCID is an open, not-for-profit organization run by and for the research community.

• We provide researchers with a unique identifier, an ORCID iD, that reliably and clearly connects them with their research contributions, affiliations, funding & facilities.

• We provide open tools (ORCID Registry & API) that enable transparent connections between researchers, and identifiers for their activities & contributions.
Our Community

• 1059 members from 40+ countries
• 20 consortia
• 600+ system integrations: all research sectors
• 7M+ iDs connected to:
  ○ 7M+ affiliations
  ○ 42M+ works
  ○ 16M+ unique DOIs
And how did we get there? Being OPEN!

**INTEROPERABILITY**

**ENTER ONCE**
**REUSE OFTEN**

**PUBLISHER**
Assert authorship

**CONNECT**
**COLLECT**

**RESEARCHER**
https://orcid.org/0000-0001-2345-6789

**CONNECT**
**COLLECT**

**EMPLOYER**
Assert affiliation

**CONNECT**
**COLLECT**

**FUNDER**
Assert award
RESPECT RESEARCHER CONSENT & PRIVACY

- AUTHENTICATION is quick, easy & accurate
- Request & obtain permission to read / write to the ORCID record (trusted parties)
- Sign in + Authorize> ORCID API pushes the iD to your system

https://orcid.org/blog/2017/02/20/whats-so-special-about-signing
Interoperability in action

Source: CIRAD

Source: Technische Universität Hamburg
ACTIVITIES IN ORCID RECORDS

AFFILIATIONS

Number of affiliation items... 7,205,795
Number of affiliation items by type...
  - EDUCATION (3,538,844)
  - EMPLOYMENT (3,164,165)

Affiliation items by visibility...
  - LIMITED (411,898)
  - PRIVATE (333,362)
  - PUBLIC (6,460,535)

WORKS

Number of works... 45,052,228
Works by visibility...
  - LIMITED (1,223,033)
  - PRIVATE (2,033,664)
  - PUBLIC (41,796,209)
How to integrate with ORCID?

1. PLAN
2. BUILD/TEST
3. COMMUNICATE
Why integrate with ORCID?

- RELIABLE CONNECTIONS
- IMPROVE DATA QUALITY
- REDUCE THE BURDEN

When institutions integrate, connect, and share data, everybody wins.
MORE INFORMATION/RESOURCES

● Technical documentation
  ○ https://members.orcid.org/
  ○ https://members.orcid.org/api
  ○ https://members.orcid.org/api/getting-started

● Vendor-enabled systems
  ○ https://members.orcid.org/api/vendors/

https://support.orcid.org/
DSpace-CRIS: the free open-source Research Information Management System fully integrated with ORCID

Andrea Bollini
www.4science.it

ORCID Webinar, Better together
19 September 2019
DSpace-CRIS is an "extended" version of DSpace, the most adopted repository platform in the world. It has a powerful and flexible data model to describe not just publications, but all the entities that populate the research environment and their meaningful relationships.

https://wiki.duraspace.org/display/DSPACECRIS/DSpace-CRIS+Home (documentation)

https://dspace-cris.4science.it/ (demo)
DSpace-CRIS is **free, open source**, compliant with **open standards**, **open protocols**, **open technologies**.

It provides institutions with a **sustainable and effective** tool to **manage research information** such as: researchers’ profiles, department pages, project grants & awards, research outputs, patents, theses, metrics, reports, statistics, etc.

Now adopted in 6 continents: [https://wiki.duraspace.org/display/DSPACEDCRIS/DSpace-CRIS+Users](https://wiki.duraspace.org/display/DSPACEDCRIS/DSpace-CRIS+Users)
One solution for multiple communities

CRIS / RIMS

Data Archive

Cultural Heritage
  - Gallery
  - Library
  - Archive
  - Museum

Repository

Expert finders
Information space

- Researcher profiles
- Organisations
- Projects / Fundings
- Publications
- Research Data
- Communities services
- Awards
- ...

Welcome to Ktis:
Ktis is an open access institutional repository gathering any digital material relating to the various activities of the Cyprus University of Technology, especially original research material produced by the members of the University. Defined in this framework, Ktis demonstrates the infrastructure and the research activities of the University, preserving, spreading and promoting the scientific research to the local and international community. Ktis was named after the symbol of the Cyprus University of Technology depicting Ktis, the spirit of creation.
Detailed Researcher’s profiles
Detailed Researcher’s profiles

Chan, DTM

Contact Information

Title:
Professor Chan, Daniel Tak Mad

Department:
Li Ka Shing Faculty of Medicine

Office:
QMH PB408

Tel: 2255 4041

Research Interests:
- Treatment and immuno-pathogenesis of lupus nephritis
- Management of viral hepatitis in immunosuppressed patients with kidney diseases

My URLs:
- Personal Page: http://orcid.org/0000-0002-3495-4051

Also Cited As:
Chan, TM
Chan, Tak-mao, Daniel
ORCID Integration

COLLECT ORCID iDs
Support collecting authenticated ORCID iDs and permission to update users’ ORCID records. Also support other ways of obtaining ORCID iDs, including in mediated deposits and bulk uploads by repository managers, as well as automated deposits from other systems.

DISPLAY ORCID iDs
Support displaying ORCID iDs wherever user/contributor information is displayed. ORCID iDs that have not been authenticated by their owner should be displayed slightly differently from those that have been authenticated.

EXCHANGE DATA WITH ORCID
Support pulling and pushing information to and from ORCID, including publications, affiliations, and other info when available.

CONFIGURATION OPTIONS
Allow administrators to configure ORCID features to meet their local needs. Also provide testing and logging features, and documentation.

INCLUDE iDs IN MACHINE-READABLE OUTPUTS
Support exposing ORCID iDs in metadata outputs, such as OAI-PMH XML, wherever possible.

Public API – Login via ORCID

A local Researcher Profile can be immediately created capturing information from ORCID

Log In to DSpace

New user? Click here to register.
Please enter your e-mail address and password into the form below.

E-mail Address: 
Password: 

Have you forgotten your password? Log In

Use your ORCID or create a new one

ORCID provides a persistent digital identifier that distinguishes you from every other researcher and, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between you and your professional activities ensuring that your work is recognized.
Click on the ORCID logo to sign in with your existent record or create a new one.

Register or Connect your ORCID ID
The researcher can connect his local profile with ORCID or create a new one. This is the only way to get an ORCID, it cannot be input manually!
Public API – Connect profile

Connected profile shows the granted authorization and provide instruction / option to disconnect
During the submission process a librarian can identify the authors in the ORCID registry or the system can use the information if provided by the external datasource (pubmed, scopus, etc.)
ORCID Integration

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Public API – Display of ORCID IDs

Zeynep Vatandas

<table>
<thead>
<tr>
<th><strong>Profile</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full Name</strong></td>
</tr>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td><strong>Role</strong></td>
</tr>
<tr>
<td><strong>Institute</strong></td>
</tr>
<tr>
<td><strong>Phone number</strong></td>
</tr>
<tr>
<td><strong>Email</strong></td>
</tr>
<tr>
<td><strong>ORCID</strong></td>
</tr>
<tr>
<td><strong>Personal Site</strong></td>
</tr>
</tbody>
</table>

Not authenticated
Public API – Display of ORCID IDs

Prof. Dr.-Ing. Andreas Timm-Giel

Authenticated ID

Timm-Giel, Andreas
TUHH Member
Leitung
Kommunikationsnetze E-4
+49 41 43-23-260

Email: timm-giel@tuHH.de
ORCID: orcid.org/0000-0002-5998-6113
Personal Site: https://www.tuHH.de/...
Public API – Display of ORCID IDs

Authors with an authenticated ORCID have the ORCID badge.
**ORCID Integration**

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Public API – Pull of information

- Initialize new local profiles upon login and user request;
- Create a local profile for identified author;
- Update local profiles with ORCID: academic society, thematic repository or track progress of former phd students, etc.
Import publications from ORCID

<table>
<thead>
<tr>
<th>Field</th>
<th>Example</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>PubMed ID</td>
<td>20524090</td>
<td>[PubMed]</td>
</tr>
<tr>
<td>DOI (Digital Object Identifier)</td>
<td>10.1021/ac0354342</td>
<td>[DOI]</td>
</tr>
<tr>
<td>SCOPUS ID</td>
<td>2-s2.0-0000000117</td>
<td>[SCOPUS]</td>
</tr>
<tr>
<td>WOS ID</td>
<td>WOS:000270372400005</td>
<td>[WOS]</td>
</tr>
<tr>
<td>ORCID ID</td>
<td>0000-0002-9029-1854</td>
<td>[ORCID]</td>
</tr>
<tr>
<td>CiNii NAIID</td>
<td>110004744915</td>
<td>[CiNii]</td>
</tr>
</tbody>
</table>
Import publications from ORCID

Bollini, A.
2006
See details & import the record

Guia de instalação DSpace-CRIS
Lucas Ângelo da Silveira, Milton Shintaku, Andrea Bollini
2016
See details & import the record

Publication metadata in CERIF: Inspiration by FRBR
Dvořák, J., Drobníková, B., Bollini, A.
2014
See details & import the record

DSpace-CRIS@HKU: Achieving visibility with a CERIF compliant open source system
Palmer, D.T., Bollini, A., Mornati, S., Mennielli, M.
2014
See details & import the record
Premium ORCID member can register webhooks to be automatically notified about changes to ORCID profiles of their interest.
The researcher can complete the import or discard suggestion

<table>
<thead>
<tr>
<th>Issue Date</th>
<th>Title</th>
<th>Author(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015;</td>
<td>DSpace-CRIS Tutorial;</td>
<td>Andrea Bollini; Pascarelli, Luigi Andrea; Palmer, David;</td>
</tr>
<tr>
<td>2016;</td>
<td>DSpace-CRIS 5 Technical documentation;</td>
<td>Andrea Bollini; Pascarelli, Luigi Andrea;</td>
</tr>
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<td>Andrea Bollini; Pascarelli, Luigi Andrea;</td>
</tr>
<tr>
<td>2016;</td>
<td>Example of XLS to import events into repository;</td>
<td>Pascarelli, Luigi Andrea;</td>
</tr>
</tbody>
</table>
DSpace-CRIS consists of a data model describing objects of interest to Research and Development and a set of tools to manage the data. Standard DSpace is used to deal with publications and data sets, whereas DSpace-CRIS involves other CRIS entities: Researcher Pages, Projects, Organization Units and Second Level Dynamic Objects (single entities specialized by a profile, such as Journal, Prize, Event etc; because any profile can define its own set of properties and nested objects).

Pascarelli, Andrea

2 publication(s) imported from Orcid. Please complete the submission from your "MyDSpace"

<table>
<thead>
<tr>
<th>Profile</th>
<th>ORCID</th>
<th>Indicators</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Name (EN version)</td>
<td>Pascarelli, LA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>English Name</td>
<td>Pascarelli, Luigi Andrea</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full Name</td>
<td>Pascarelli, Luigi Andrea</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variants</td>
<td>Pascarelli, LA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Member API – Push information

- **Synchronization activated**
- **The queue**
  - Person data including employment and education
  - Fundings
  - Works
  - PUT codes are stored to manage update
  - Manual PUSH
Work has structured data including SELF and PART identifiers and a BibTeX representation as citation.
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CONFIGURATION OPTIONS
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INCLUDE IDs IN MACHINE-READABLE OUTPUTS
Support exposing ORCID IDs in metadata outputs, such as OAI-PMH XML, wherever possible.

Suggest publication import from ORCID (WebHook)

Public API | Member API | Premium Member API
Sandbox | Production
Grant scope
Mapping from – to ORCID for biography data, work, funding, employment, education

Synchronization mode: automatic, manual

Documentation

- [https://wiki.duraspace.org/display/DSPACECRIS/ORCID+Integration](https://wiki.duraspace.org/display/DSPACECRIS/ORCID+Integration)
Researcher Synchronization preferences

ORCID Synchronization settings

Synchronization mode

Enable "Manual" Synchronization Mode to disable batch synchronization, so you must send your data to Orcid Registry manually.

Synchronization mode: Batch → Manual

Publications Preferences

- Disable
- Send all publications
- Send my selected publications
- Send my publications

Projects Preferences

- Disable
- Send all projects
- Send my selected projects
- Send my projects

Profile Preferences

Choose your preferences for profile:
- biography
- credit name
- primary email
- name
- iso 3166 country
- keywords
- other-emails
- other names

Save Changes  Exit
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ORCID IDs can be included in any format exposed over OAI-PMH

DSpace-CRIS supports out-of-box the following guidelines where the ORCID IDs are exposed
- Guidelines for DataArchive based on DataCite schema 4
- Guidelines for CRIS Manager based on CERIF*

* Under review, to be merged in the official branches in few weeks
Signposting is an approach to make the scholarly web more friendly to machines, exposing relations as Typed Links in HTTP Link headers.

The following patterns are supported in DSpace-CRIS:

- **Author**: links to authors ORCID or VIAF records
- **Identifier**: link to ORCID from DSpace-CRIS researcher pages, link to the Handle/DOI from the landing page or fulltext (PDF, etc.)
- **Publication Boundary**: links to the actual fulltext from the landing page

https://wiki.duraspace.org/display/DSPACECRIS/Signposting
Thanks for your attention!

Andrea Bollini
andrea.bollini@4science.it
skype: a.bollini
linkedin: andreabollini
orcid: 0000-0002-9029-1854

www.4science.it
Better Together: EPrints
Rory McNicholl (CoSector) & Will Fyson (EPrints Services)
ORCID Support Plugins

ORCID integration with EPrints comes in two flavours:

- **ORCID Support**
  - Non-members framework for ORCID
  - Adds ORCID fields to user profiles and EPrints metadata
  - Provides basic reporting

- **ORCID Support Advance**
  - Membership API - Create and Connect Button
  - Imports and Exports
  - Award-winning plugin with the UK ORCID Consortium
Both the plugins are available from the EPrints Bazaar
ORCID Support (Basic)

- Basic functionality for non-members
- Bespoke ORCID field for validating ORCIDs
- Basic reporting on ORCID uptake
- Feeds through to REF submissions (for UK users)
ORCID Support Advance

- Requires ORCID Membership
- Create or Connect your ORCID iD
- Manage permissions for reading and writing
- Enhanced reporting

Manage ORCID Permissions

ORCID details for ULCC Admin

For more information about connecting to ORCID, click here.

https://orcid.org/0000-0001-7948-4937

The permissions to access your ORCID record that you have granted to LSTM Online Archive via the ORCID system are listed here:

- Retrieve your ORCID id only
  - Create and update details of your research activities (publications, and education or employment) already added to your ORCID record by LSTM Online Archive
  - Retrieve details from your ORCID profile restricted to trusted parties only

These permissions are due to expire on Tue Jun 21 11:50 2039 BST.

Please Note: You can remove the granted permissions at any time from within your ORCID account or by changing the selected permissions below and re-connecting to ORCID.

We will only use these granted permissions as indicated below. To change how we use these conditions please contact Library@ltmed.ac.uk

Select the permissions you would like to grant to the repository below. Once selected, click the 'Create or Connect your ORCID iD' button to update your permissions.

- **Connect to ORCID**
  - Allows LSTM Online Archive to link your ORCID iD with your LSTM Online Archive record. This is the minimum permission required and is therefore unrestricted.

- **Create and update activities on your ORCID record**
  - Allows LSTM Online Archive to add details of your publications to your ORCID record and update the details of publications which have already been added to your ORCID record by LSTM Online Archive.

Upon allowing this permission, LSTM Online Archive will also attempt to update your employment or education activities. Please see Updating Employment/Education Activities for more information.

- **Retrieve restricted details from your ORCID profile**
  - Allows LSTM Online Archive to retrieve details from your ORCID profile that are restricted to your trusted parties only

Users with an ORCID

10 users

<table>
<thead>
<tr>
<th>User</th>
<th>ORCID ID</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alan Smith</td>
<td>0000-0001-4900-8814</td>
<td>Retrieve your ORCID id granted, Create and update details of your research activities granted, Retrieve details from your ORCID profile restricted to trusted parties only granted</td>
</tr>
<tr>
<td>Dr. Neil Evans</td>
<td>0000-0001-6888-74659</td>
<td>Retrieve your ORCID id granted, Create and update details of your research activities granted, Retrieve details from your ORCID profile restricted to trusted parties only granted</td>
</tr>
<tr>
<td>Monica Davis</td>
<td>0000-0001-7642-7897</td>
<td>Retrieve your ORCID id granted, Create and update details of your research activities granted</td>
</tr>
</tbody>
</table>

- ~15 institutions using the plugin, from here to Australia!
ORCID Support Advance

Import Works

- Displays ORCID works from your orcid.org profile
- Choose which ones to import to your user work area
- Hides works already in the repository to avoid duplicates
- Admins can import on behalf of other users

![Screenshot of ORCID import process](image-url)
ORCID Support Advance

Export Works

- Displays EPrints associated with your ORCID
- Choose which ones to export to your orcid.org profile
- Updates works previously exported with new versions
- Admins can export on behalf of other users
Future Work

- Improve import further!
  - Enhancing ORCID import with DOI/BibTeX import for more metadata

- Automatic import/exports
  - Export when records are made live
  - Import on a routine basis

- Remove works from orcid.org previously exported from a repository

- Support external co-author ORCIDs
  - ORCIDs need to be verified - we’re looking into support verification from sources beyond the repository

- Integration with UK ORCID Consortium COrDA project
  - A community dashboard collating ORCID data