

# ORCID Resources

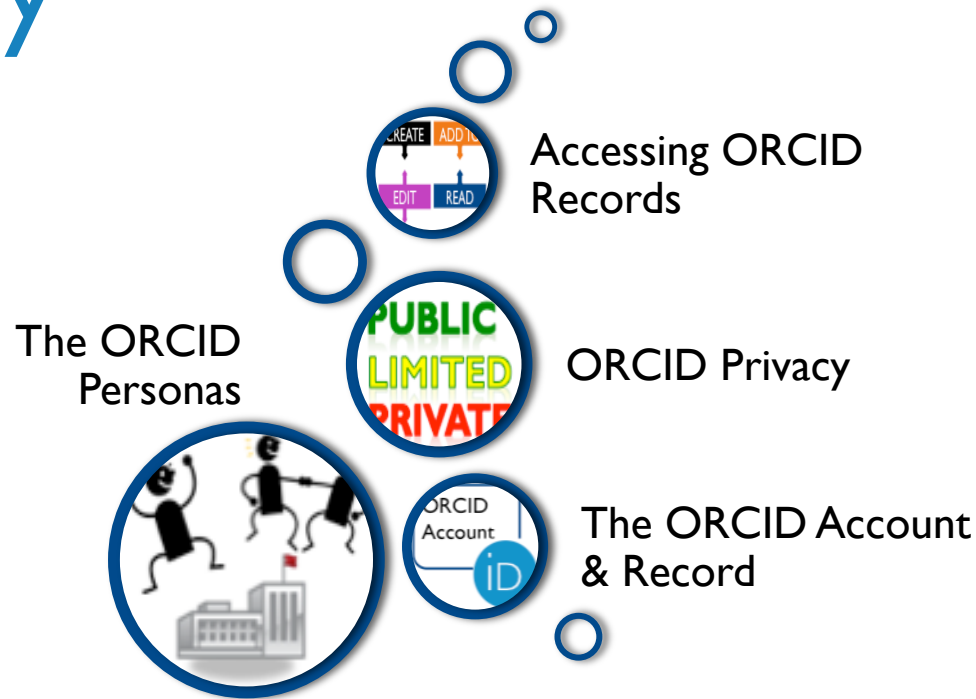
ORCID Launch Partner Webinar

August 16, 2012

# Today's Agenda

- Understanding the ORCID Registry
- Case Studies
- About the Launch Partner Program
- Resources
- Next steps

# Understanding the ORCID Registry



## The ORCID ID

<http://orcid.org/0000-0002-3843-3472>

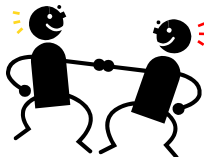
- 16-digit number
- Compatible with ISO 277729 standard
- Last character is a checksum (ISO/IEC 7064:2006, MOD 11,2)
- Expressed as an HTTP URI

# The ORCID Personas



## The Scholar/Researcher

*Individual for whom the ID and Record are created and maintained*



## Proxy(ies)

*Individual(s) assigned by the Scholar to edit the ORCID Record on the Scholar's behalf (though the website)*



## Trusted Organization(s)

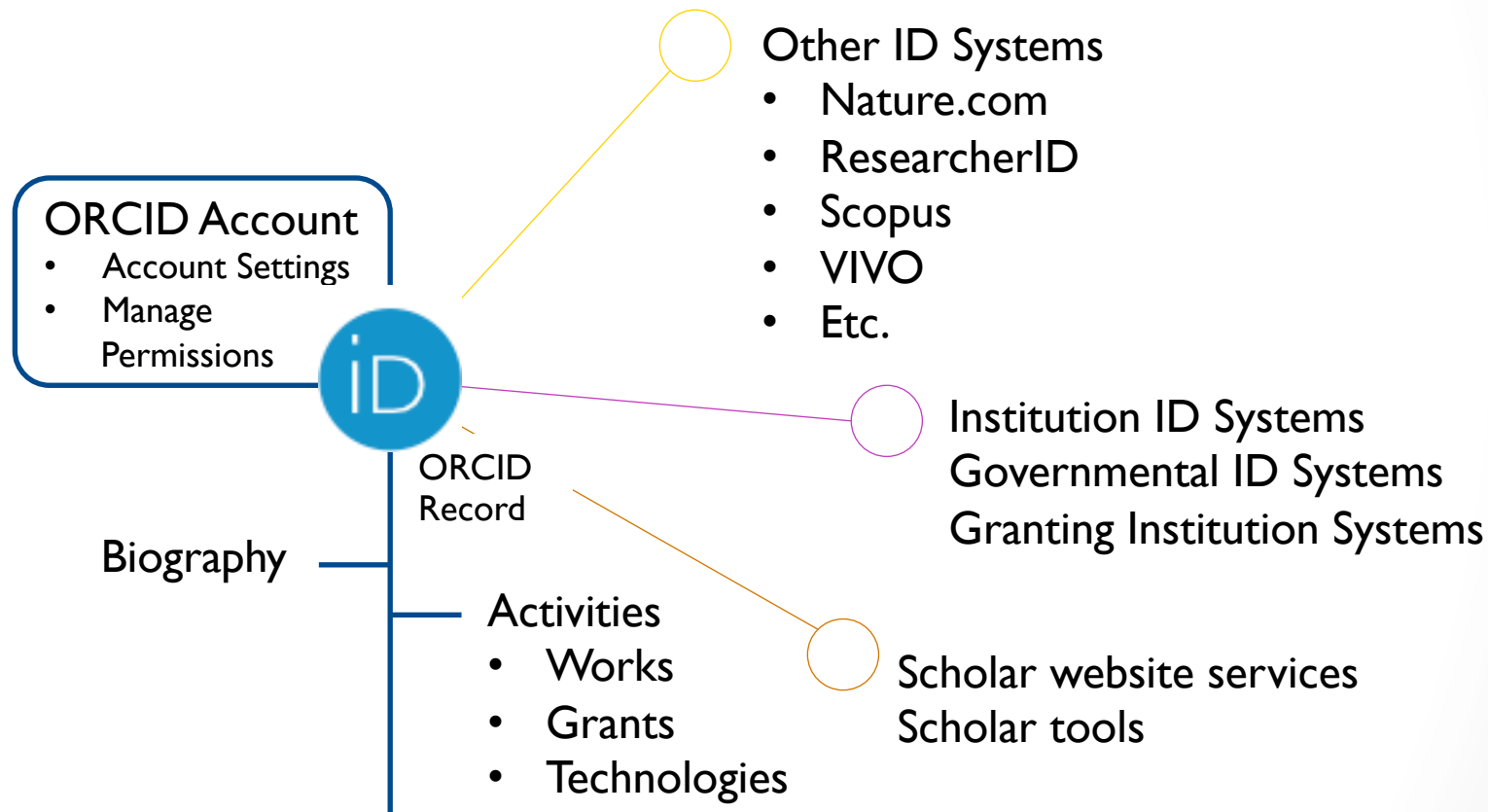
*Organizations assigned by the Scholar to view, edit or add to the ORCID Record on the Scholar's behalf (through the API)*



## The ORCID Account Owner

*Usually the Scholar. If an institution creates an ID, could be the institution.*

# The ORCID Account/Record



# ORCID Privacy

- Information in an ORCID Record has a privacy setting

**PUBLIC**

*Accessible by anyone*



**LIMITED**

*Accessible by Account Owner, Proxy(ies), Trusted Organization(s)*

**PRIVATE**

*Accessible by Account Owner, Proxy(ies)*

- 
- Account info accessible by the account owner

**ACCT OWNER**

ORCID Account

- Account Settings
- Manage Permissions

- 
- SETTING PRIVACY: done by Account Owners or Proxies

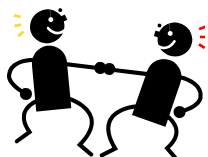
# Accessing ORCID Records



Scholar/Researcher  
**From the Website**



ORCID  
Record



Proxy(ies)  
**From the Website**



ORCID  
Record



Trusted Organizations  
**From the API**



*CREATE permission:*  
*granted by ORCID only if employer*



*EDIT permission:*  
*one time ONLY for short term;*  
*granted at time of edit*



*APPEND permission:*  
*one time ONLY for short term;*  
*granted at time of addition*



*READ permission:*  
*granted until revoked by user*



ORCID  
Record

# The APIs

- Public API (sometimes called the Tier 1 API)
  - No token or registration needed
  - Can only access data marked as public
  - Can only READ
- Member API (sometimes called the Tier 2 API)
  - Registration and token needed
  - Can access data marked as public or limited
  - Can READ, EDIT, APPEND. For institutions, it is also possible to CREATE
  - Specific permissions must be granted by the Scholar



# Case Study

An ID is created by an institution, and then claimed and managed by the Scholar

1



CREATE

ADD TO

ORCID  
Record

Institution creates  
an ID for a Scholar

API POST

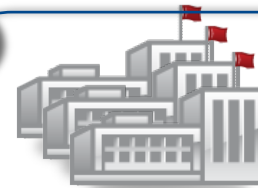
2

EDIT  
APPEND  
READ

Scholar claims the ID,  
sets privacy levels,  
establishes trust relationships

ORCID Web Interface

3



ADD TO

READ

ORCID  
Record

Trusted organizations  
add activities and  
receive updated  
Scholar information

API POST / GET

# Case Study

A Scholar establishes a trust relationship while at a member site

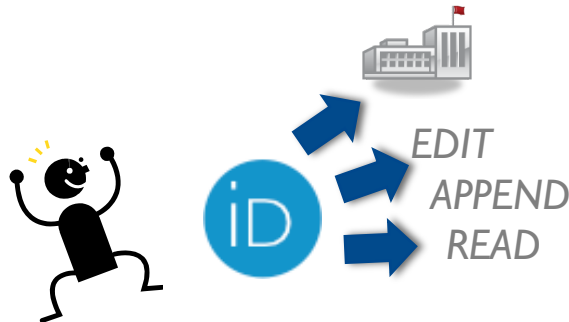
1



Member site asks  
for permissions  
from a Scholar

ORCID Widget  
OAuth 2.0

2



Scholar reviews the  
request and establishes  
trust relationships

ORCID Widget  
OAuth 2.0

3



Member site becomes  
trusted; may add  
activities and receive  
record updates

API POST / GET

# Launch Partners Program

## In the Launch Partners Program

- Access to the latest APIs & documentation
- Sandbox OAuth token to test using the APIs
- Access to the production Registry BEFORE mid-October
- Technical Support BEFORE mid-October

## NOT in the Launch Partners Program

- Access to the latest APIs & documentation
- Sandbox OAuth token to test using the APIs
- Access to the production Registry AFTER mid-October
- Technical Support AFTER mid-October

# To Be Released in October

## For Individuals

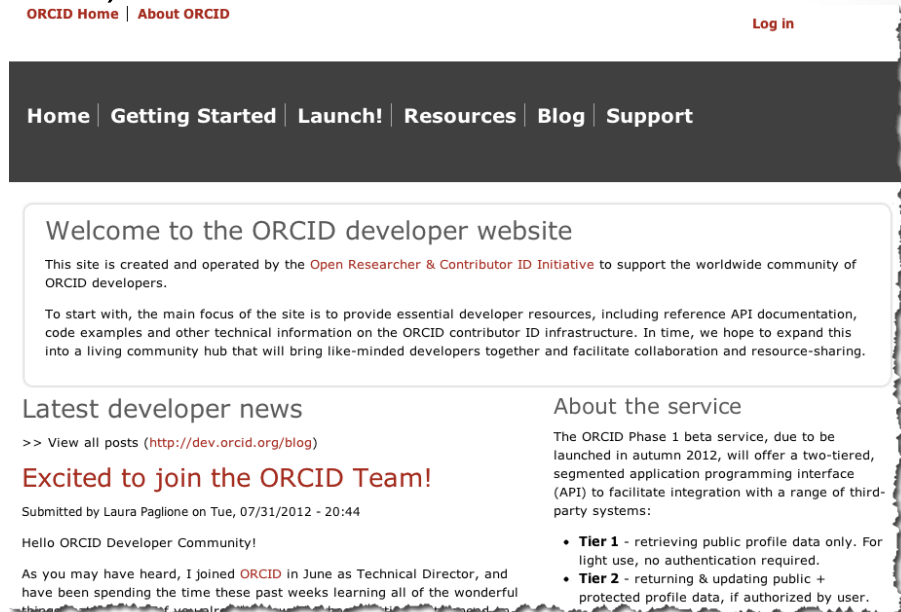
- Public Registry – Anyone can create an ORCID ID and search the Registry
- ORCID Record
  - Link ID to other identifier schemes, synch data
  - Enhance ID with information on research activities, including biography, works, grants and technology/products

## For Member Organizations

- Updated APIs / XML
- Create IDs for employees and students
- Trusted relationship management to share information

# Resource: News/Documentation

- Developers Portal ([dev.orcid.org](http://dev.orcid.org))
  - Latest about the Launch ([dev.orcid.org/launch](http://dev.orcid.org/launch))
  - Documentation, code samples ([dev.orcid.org/resources](http://dev.orcid.org/resources))
  - Blog with the latest updates ([dev.orcid.org/blog](http://dev.orcid.org/blog))
  - Links to support (available in Oct)



The screenshot shows the ORCID developer website. At the top, there are links for "ORCID Home" and "About ORCID", and a "Log in" button. Below this is a navigation bar with links for "Home", "Getting Started", "Launch!", "Resources", "Blog", and "Support". The main content area has a heading "Welcome to the ORCID developer website" followed by a paragraph stating the site is created and operated by the Open Researcher & Contributor ID Initiative. Below this is another paragraph explaining the site's focus on providing developer resources. To the left, there is a section titled "Latest developer news" with a link to view all posts and a post titled "Excited to join the ORCID Team!" by Laura Paglione. To the right, there is a section titled "About the service" explaining the ORCID Phase 1 beta service and its two-tiered structure.

ORCID Home | About ORCID Log in

Home | Getting Started | Launch! | Resources | Blog | Support

### Welcome to the ORCID developer website

This site is created and operated by the **Open Researcher & Contributor ID Initiative** to support the worldwide community of ORCID developers.

To start with, the main focus of the site is to provide essential developer resources, including reference API documentation, code examples and other technical information on the ORCID contributor ID infrastructure. In time, we hope to expand this into a living community hub that will bring like-minded developers together and facilitate collaboration and resource-sharing.

#### Latest developer news

>> View all posts (<http://dev.orcid.org/blog>)

#### Excited to join the ORCID Team!

Submitted by Laura Paglione on Tue, 07/31/2012 - 20:44

Hello ORCID Developer Community!

As you may have heard, I joined **ORCID** in June as Technical Director, and have been spending the time these past weeks learning all of the wonderful things about the project.

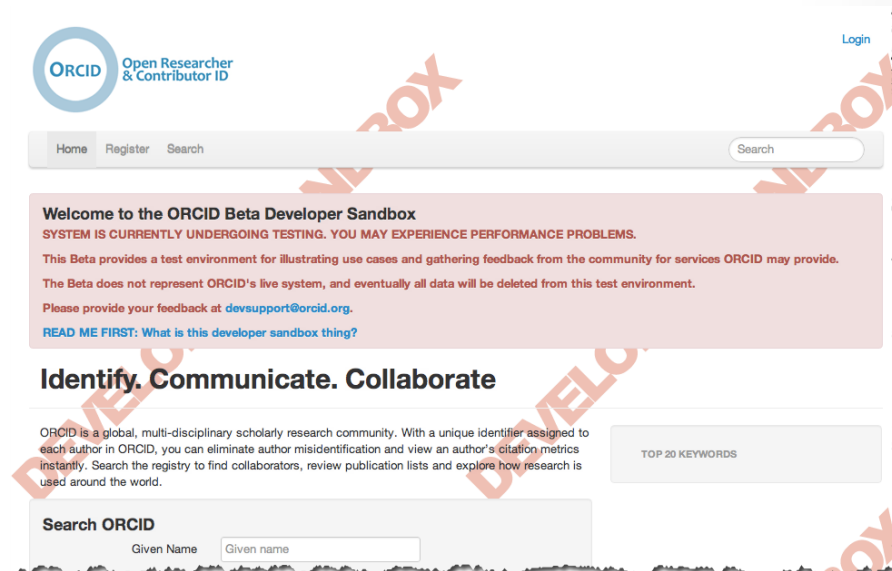
#### About the service

The ORCID Phase 1 beta service, due to be launched in autumn 2012, will offer a two-tiered, segmented application programming interface (API) to facilitate integration with a range of third-party systems:

- **Tier 1** - retrieving public profile data only. For light use, no authentication required.
- **Tier 2** - returning & updating public + protected profile data, if authorized by user.

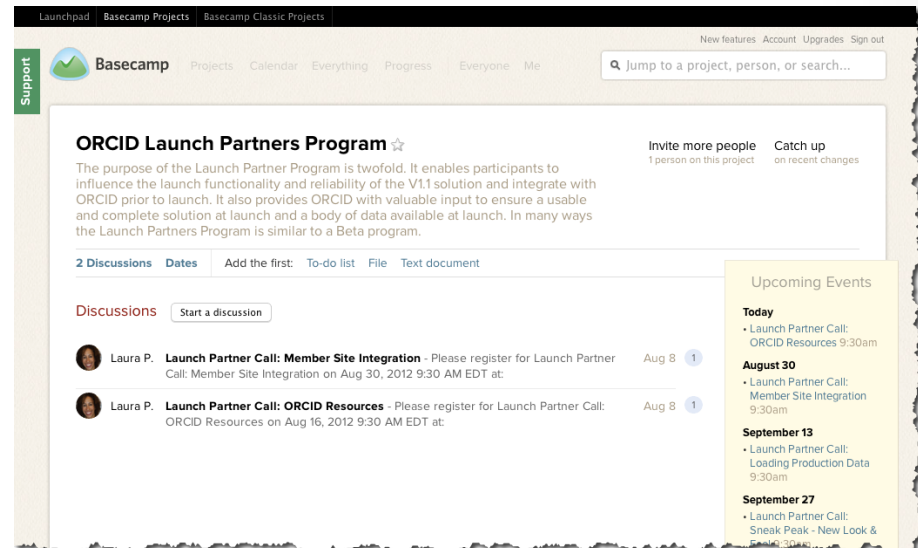
# Resource: Sandbox-Try the API

- Sandbox Site ([devsandbox.orcid.org](https://devsandbox.orcid.org))
  - Fully functioning API
  - Tokens available at [dev.orcid.org/create-client-app](https://dev.orcid.org/create-client-app)
  - Limited web interface
  - In synch with the production server and Registry
  - Non-persistent. Data is refreshed periodically



# Resource: Launch Support

- Launch Basecamp Project ([goo.gl/5OVHI](http://goo.gl/5OVHI))
  - LAUNCH PARTNERS ONLY
  - Look for your invitation if you are a launch partner
  - Support forum – all launch partners benefit from questions & answers
  - Best practice sharing
  - Feedback and input
- NOTE: after launch, all members will receive support



# Next Steps

- Everyone

- ☐ Get a token to use the Sandbox ([dev.orcid.org/create-client-app](https://dev.orcid.org/create-client-app))
- ☐ Review documentation ([dev.orcid.org/resources](https://dev.orcid.org/resources))
- ☐ Signup for the next webinar ([goo.gl/3FXjU](https://goo.gl/3FXjU))
  - Aug 30--Member Site Integration: API Details, common workflows
- ☐ Subscribe to the blog for the latest updates  
(RSS: [dev.orcid.org/blog/51/feed](https://dev.orcid.org/blog/51/feed))

- Confirmed Launch Partners

- ☐ Look out for your Basecamp invitations
- ☐ Send names/emails of others on your team to  
[l.paglione@orcid.org](mailto:l.paglione@orcid.org) to be added to the Basecamp project
- ☐ Review next steps on Basecamp





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ORCID

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**THANK YOU!**