

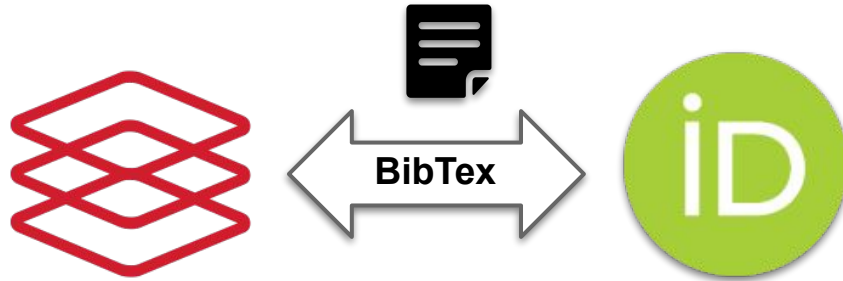
# Pushing publications from Elements to ORCID

North American User Meeting - October 2019 #DSUserDay19

Kate Byrne - VP, Product Management  
kate@symplectic.co.uk @katecbyrne

# ORCID integrations to date

# 1. Transfer publication metadata using BibTex



Both Elements and ORCID support exporting and importing publication metadata using the BibTex file standard.

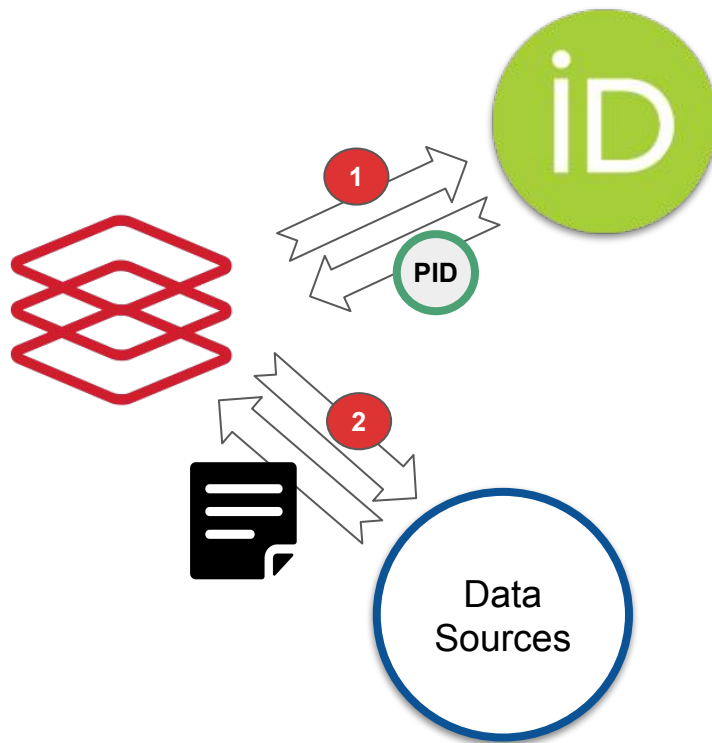
This manual method allows quick and easy transfer of metadata between systems. It also allows researchers to choose exactly what to export/import and to edit metadata before importing if desired.

## 2. Automatic harvest of Publication IDs from ORCID

Our original “ORCID integration” allows users to authenticate their ORCID IDs within Elements.

Elements then regularly searches ORCID for any persistent identifiers (PIDs) found in user’s ORCID records and uses the returned PIDs to fetch publications from Elements data sources.

This allows Elements to create an active link with the source, obtain richer metadata about each publication including supplementary metadata such as citation counts.



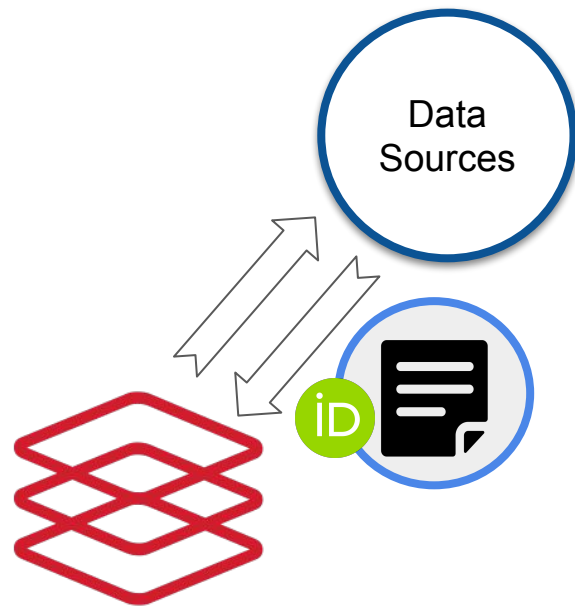
### 3. Using ORCID IDs in Elements' 'auto-claiming'

Elements also uses ORCID IDs for their intended purpose, to help uniquely identify researchers and contributors in records across the research ecosystem.

Elements mines the metadata included with publications from data sources to find unique ids including ORCID IDs.

IDs are offered to the researcher and, once claimed, used to search for more publications and also (optionally) to auto-claim them, saving the researcher time and effort.

Once they have claimed an ORCID researchers can also choose to authenticate it use the other integrations.



# Our latest integration

# Writing publications to ORCID

From Elements v5.18, researchers will be able to elect to send publication records from Elements to ORCID.

The new integration, allows researchers to automatically associate their publications already collected within Elements with their ORCID ID.

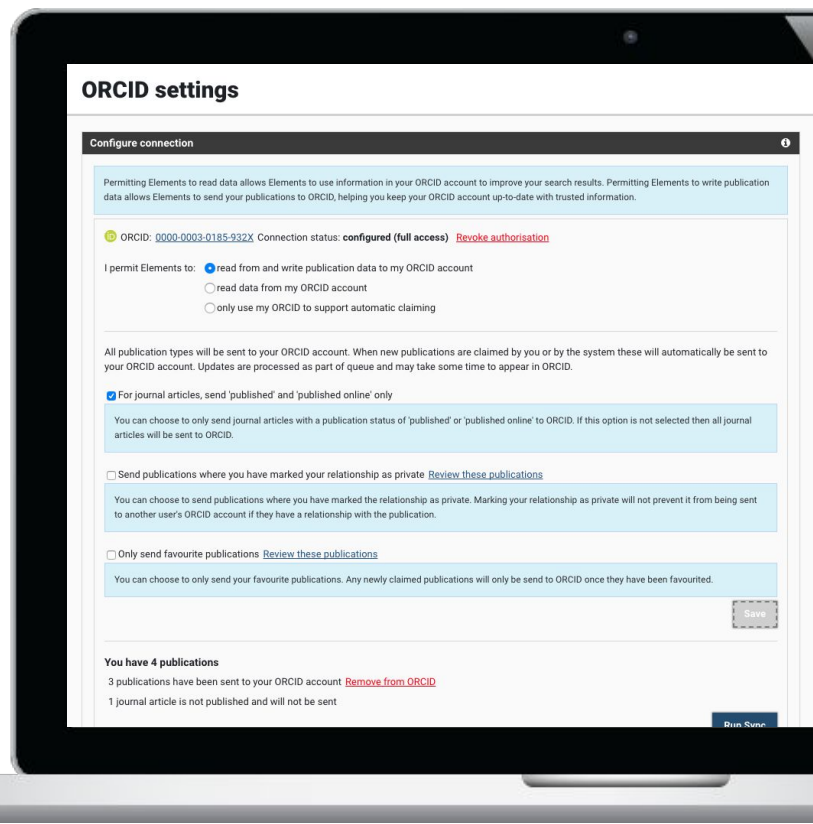


# From the Faculty Perspective

Our new '**ORCID settings**' page allows users to control write integration.

Designed to work in step with existing Elements functionality, the new 'write' functionality offerings faculty a number of settings to control which (if any) publications are sent to ORCID.

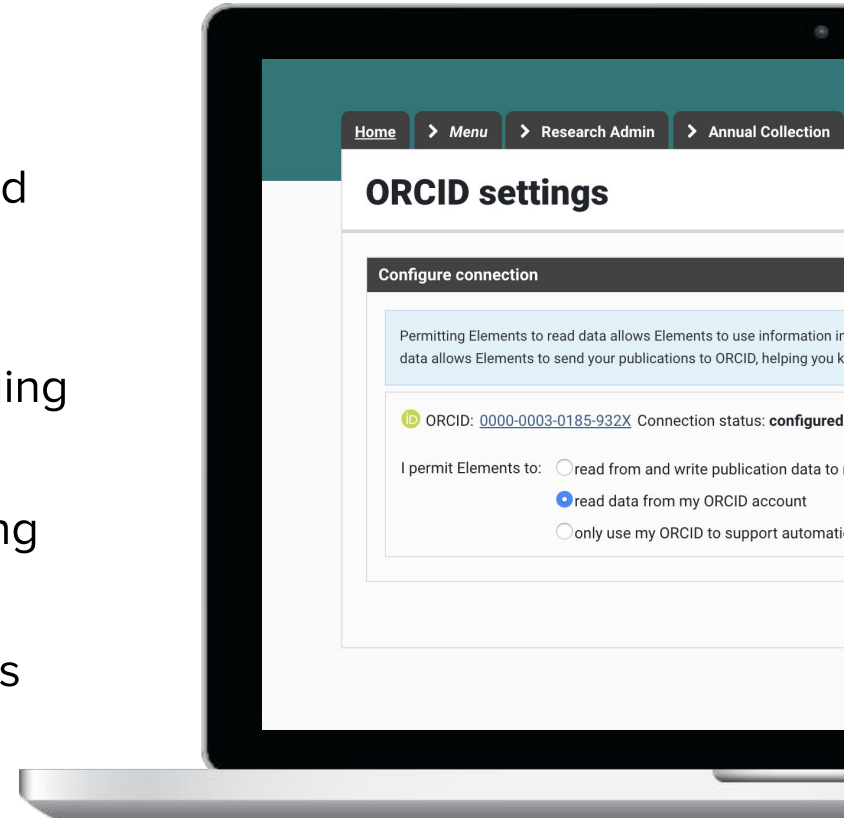
Note: Enabling the write integration requires existing ORCID connections to be reauthenticated.





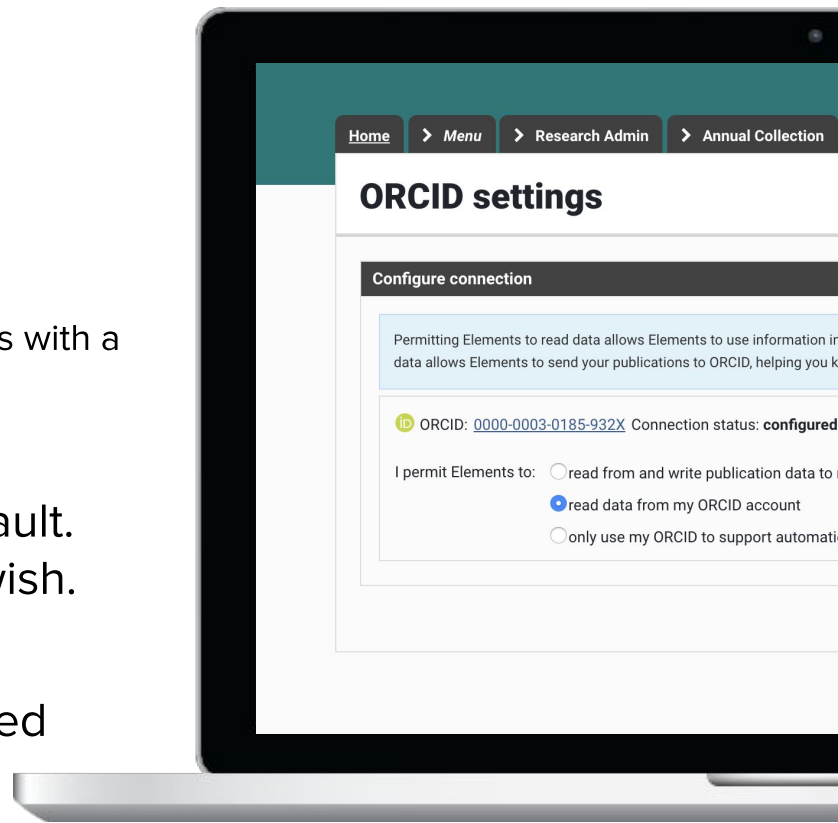
# Some details...

- Users can define which publications to send using a number of settings, but can only enable to write to a single ORCID.
- Publications (and updates) sent using queuing mechanism
- Publications rejected in Elements after being sent to ORCID are auto-deleted on ORCID
- User can also choose to delete publications directly within ORCID.



# Some (more) details...

- Researchers can choose to:
  - Send all publications,
  - For journal articles, only send publications with a status of published or published online,
  - Only send favoured publications.
- ‘Hidden’ Publications are not sent by default. Faculty can elect to override this if they wish.
- Highest precedent record metadata sent (including BibTex reference). User preferred record takes precedent if present.



# Demo

## ORCID settings

### Configure connection

Permitting Elements to read data allows Elements to use information in your ORCID account to improve your search results. Permitting Elements to write publication data allows Elements to send your publications to ORCID, helping you keep your ORCID account up-to-date with trusted information.

 ORCID: [0000-0003-0185-932X](#) Connection status: **configured (full access)** [Revoke authorisation](#)

I permit Elements to: ☒ read from and write publication data to my ORCID account

☐ read data from my ORCID account

☐ only use my ORCID to support automatic claiming

All publication types will be sent to your ORCID account. When new publications are claimed by you or by the system these will automatically be sent to your ORCID account. Updates are processed as part of queue and may take some time to appear in ORCID.

☒ For journal articles, send 'published' and 'published online' only

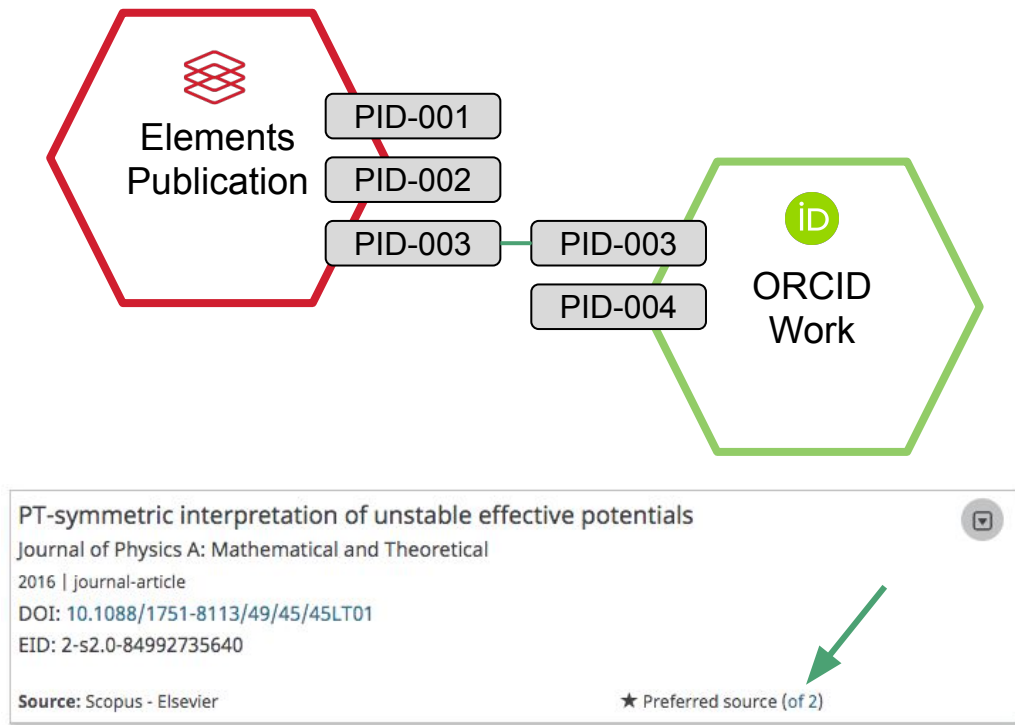
You can choose to only send journal articles with a publication status of 'published' or 'published online' to ORCID. If this option is not selected then all journal articles will be sent to ORCID.

☐ Send publications where you have marked your relationship as private [Review these publications](#)

You can choose to send publications where you have marked the relationship as private. Marking your relationship as private will not prevent it from being sent to another user's ORCID account if they have a relationship with the publication.

MacBook

# Matching to records already within ORCID

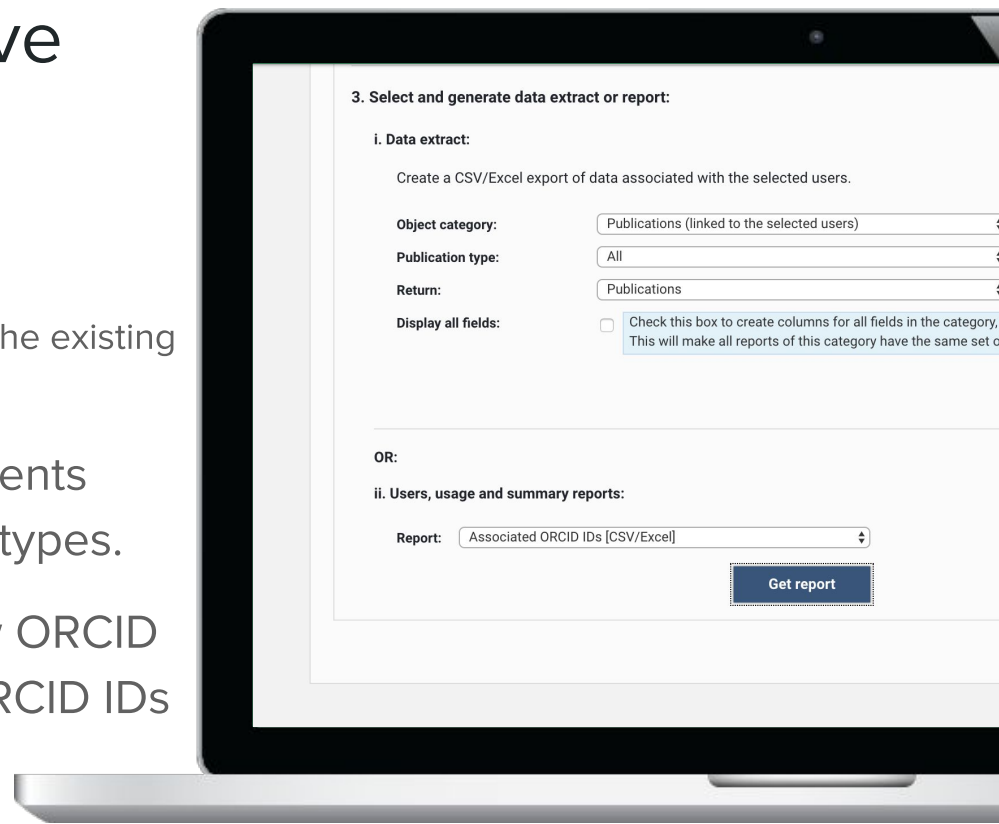


- Persistent identifiers used to match publications within ORCID
- ORCID user can then determine which source is 'preferred' and displayed in their ORCID record
- If persistent identifiers are absent, or not matching, the publications will not match and duplicates may exist
- To deal with duplicates users can curate their record within ORCID or within Elements

# From an Admin perspective

System Administrators can:

- Enable the new Write integration.
  - Organisations can continue to use just the existing integration if they wish.
- Configure mappings between Elements Publication types and ORCID Work types.
- Run reports on adoption of the new ORCID integration using the Associated ORCID IDs basic report.



# Configuring Type Mappings

- Default Elements types are already mapped to the corresponding ORCID Work type 'out of the box'
- System Administrators can configure the type mapping, allowing Elements to also push custom publication types.
- As Elements supports a wider range of type than ORCID does, a number of Elements publication types will need to map to the 'other' ORCID category

Elements identifier		ORCID work type	ORCID category
artefact		other	Other
book		book	Publications
chapter		book-chapter	Publications
composition		other	Other
conference		conference-paper	Conference
dataset		data-set	Other
design		other	Other
exhibition		other	Other
figure		other	Other
fileset		other	Other
internet-publication		other	Other
journal-article		journal-article	Publications
media		other	Other
other		other	Other
patent		patent	Intellectual Property
performance		artistic-performance	Other
presentation		lecture-speech	Other
poster		conference-poster	Conference
report		report	Publications
scholarly-edition		other	Other
software		software	Other
thesis-dissertation		dissertation	Publications

# What's coming next?



# What's coming next?

## Beyond Elements v5.18

We want to do a little more work on **notifications**. When enabled, this will encourage researchers to consider reauthenticating their ORCID and using the new Write integration.

We are also beginning work to add support to allow institution's to use Elements to **assert institutional affiliations** for researchers.

# Questions?