

ORCID support workshop 25 May 2016 ... summary notes

The Jisc team supporting ORCID adoption and the UK ORCID consortium held a successful and well attended workshop on 25th May in Birmingham.

The full agenda with hyperlinks to informal notes from the sessions is at:

<http://bit.ly/29qKviV>

This summary attempts to pull together key points from many sessions in a busy day. The day finished with software system specific sessions which are not summarised here but can be found from the agenda at the link above.

Balviar Notay introduced the event and gave some background to UK ORCID adoption highlighting some key points:

- ORCID UK consortium membership stands at 66 (at 16/05/2016); RCUK [now joined](#)
- Wide variety of institutions joining and promoting to their researchers through social media, internal information systems and other means
- UK hosted a Knowledge Exchange event, attended by representatives from many European countries, focusing on implementation and sharing experiences

She went on to summarise the help and benefits available to the consortium including: public and dedicated email lists; specific technical support including hack days; helpdesk, routing enquiries to appropriate staff; gathering, sharing and responding to technical interoperability requirements across UK universities; UK ORCID user community events; vimeo recordings of new member seminars, e.g.: <https://vimeo.com/134316770> and <https://vimeo.com/146407594> ; and coming soon – a [dedicated web site](#) with blogs, [FAQs](#) and a flow chart for those [thinking about ORCID](#) implementation, including hyperlinks to relevant documentation. She emphasised that identifiers were a key element in the future Open Scholarship landscape. She also mentioned [IRUS/ORCID](#) exploration and [Monitor Local](#), other Jisc projects beginning to explore and consume ORCID data. Jisc is also involved in much other standards and identifiers work which will both feed into and be informed by the ORCID support project. Owen Stephens went on to demonstrate the ongoing work on the dedicated web site which can now be found at: <http://ukorcidsupport.jisc.ac.uk/>

Josh Brown gave an update on ORCID, pointing at recent progress and milestones, including over 10 million articles in leading publications linked to ORCID, over 2.2 million IDs, national and regional consortia and examples of interoperability with Oxford, Wiley, NIH, UC Davis, The Royal Society, DataCite and more. He also mentioned that, as ORCID grows, members will [help to shape](#) the organisation. [Josh Brown's presentation](#).

Paul Wellington-Green from RCUK spoke about developments since RCUK joined the consortium. In May, RCUK announced that applicants to Research Councils could now create and connect their ORCID iD in the grants system (Je-S). By the end of the summer the RCUK Gateway to Research (GtR) will publish ORCID with Research Information in the public domain, and users will be able to search, browse and download information using ORCID which will also be available through the API. Interoperability work with ORCID continues, including ResearchFish and discussions are ongoing with other funders. In designing the new grants system, consideration is being given to the reuse of information from ORCID as part of the grant application process. Peer review functionality will also be explored. [Paul Wellington-Green's presentation](#).

Neil Jefferies from University of Oxford spoke about the survey he has conducted on ORCID integration in the UK. Notes to be circulated when Neil's analysis is completed.

Break out sessions were held on a number of topics. Here we include some key points, various comments and different views from participants and we also link to individual session notes (where we have not included them in full) for those wanting more detail.

I'm a member what next?

We need to be clear that ORCID is not a profiling system itself but a key node in the information eco-system. It should be regarded as an investment in downstream benefits. However some feel pressure from their institutions to demonstrate a) the value returned for their investment in membership and b) the local take up and "success" of sign up efforts within the institution. Possible responses to this might include: working with ORCID to make it easier to identify institution-affiliated ORCIDs; providing more material on ORCID and the UK consortium aimed at senior management; development of a registration 'app' for institutions that have no system such as a CRIS in place. Another "onboarding seminar" aimed at recently joined members will be held soon, meanwhile the last two very useful seminars are available on vimeo and linked from the previous page. Further [notes from "I'm a member what next?" session](#).

Initial advocacy

Much discussion on perceived and possible incentives and disincentives for individual researchers to engage with ORCID. There is confusion amongst many researchers about the role of ORCID – it is not a profiling or CV system it is an enabling ID. Yet for most researchers, their individual engagement with it is as a record of publications, outputs, affiliations and achievements. It is not in their hands to engage with the systems integrations necessary to bring obvious individual benefits, so it is hardly surprising that the confusion arises. Further [notes from "Initial advocacy" session](#).

Making use of ORCIDs – Strategic Choices, Tactical Options

ORCID stores affiliation data and this is important for institutions as they can assert/validate affiliation statements.

Which integration to tackle first? There will be cultural/political/technical factors affecting your choice. The tactical choice may differ from the strategic one.

The tactical choice will likely be to do what is easiest (or possible).

- Does your institution have internal expertise and authority/ability to develop the system? It may be easier to make things happen in CRIS or IR.

The strategic choice will be what is desirable (or necessary).

- What are the drivers/requirements internally, from funders or publishers? It may make sense to choose integration in a more 'central' system - like Identity Management or Directory services, even if it takes longer to implement.

You may choose to take a holding position where you encourage individual sign-up while putting in place the resources and buy-in for integration.

There are many different systems in an institution which may use ORCIDs, e.g.

- Award submission (now required/encouraged by 4 funders) and award management
- Identity management or Directory Services
- Get list of publications (IR, CRIS)
- Push publications (IR, CRIS) ... etc

but there may also be a single (and different) system that allows registration and manages ORCIDs within the institution (and may also assert affiliation back to ORCID).

The table below is not complete and should not be regarded as authoritative – possibly the best

use for this table is for you to replace each cell with your local information, this may act as a prompt to raise questions or find answers you do not have.

Systems	How will ORCID be used?	ORCID comes from?	What are the barriers?
CRIS	Pull info from ORCID to populate; push data to ORCID	Researcher registering	Missing users (e.g. PHDs), technical expertise & access
Institutional Repository	Pull data and metadata from ORCID to populate; push data to ORCID	Internal integration (or researcher registering)	Cultural, disciplinary, technical expertise & access
HR	HESA submission Share with other systems REF??	Internal integration	May be inflexible, political issues over control Missing users (e.g. PHDs), technical expertise & access
User directory	Sharing with other systems, e.g. IR. Delegates options to them	Researcher registering (or internal integration)	May be inflexible, political issues over control Missing users (e.g. PHDs), technical expertise & access
Award management	Submission to funders	Internal integration	Interoperation with funder systems. Sensitivities from researchers
Local ORCID management & registration system	Assert/withdraw affiliation Share with collaborating institutions, help avoid duplications ease staff joining and leaving.	Researcher registering, giving appropriate permissions for use and sharing	Development effort for system and internal integrations mentioned above.

Further [notes from "making use of ORCID's" session](#)

Promoting ORCID – As a persistent ID, a connecting hub, a researcher record?

Similar issues were raised to those in the "initial advocacy" session. ORCID is not a profiling system or a CV creation tool or even a repository for publication metadata; but it should make CV systems, CRIS and other systems work better. The reason the works are in ORCID is to help uniquely identify and disambiguate. But it is hard to get this across as the way most people interact with ORCID is through entering their publications/achievements/outputs/affiliations. It would help to guide researchers to the best place to curate their works metadata since curating works in multiple places is exactly the burden that ORCID should help to lift (not just create one more place for curation). The Open University (OU) is guaranteeing that if the metadata is in ORCID then it will be harvested automatically into the repository so the researcher only has to enter once (whether into Scopus or wherever). Rather than just encouraging researchers to register and enter their details, the key thing is for them to start using their ORCID in their interactions (submitting publications, for funding applications, job applications, refereeing, finding collaborators etc). There are places where academics are happy to find time to enter data but

they are usually places which mean something to them either for their community or their reputation/career or their social life.

A new CRIS should have a field for an existing ORCID and if none take the researcher to a registration page (where there should be a check on existing/past email addresses to confirm no existing ORCID).

Speakers from two Universities one PURE and one Symplectic ... ORCID pushes to Symplectic ... PURE pushes to ORCID, but neither are two way?

The key challenge, even if you have a well populated CRIS, is how to get information out of that into other places where it is required. Researchers moving institution is a good use case for ORCID but will the CRIS be able to talk to each other? It would be very good to have a case study of a researcher moving institution.

Further [notes from "Promoting ORCID" session](#)

Managing data tagged with ORCIDs

There is a lot of interest in registering ORCIDs with HR systems but the level of readiness in terms of technology and process is quite low, so people are using alternative canonical sources at this stage.

As the tech is all relatively new, many people are holding off implementation proper until various technical issues and upgrades are made.

Other places where canonical records are placed:

- Custom ORCID system, separate from all other systems. This has worked out well for the participant who had done this, as it sidestepped technical and infrastructural issues, and has given a new home to "research" at their institution
- CRIS. This was quite common, as these systems seem most well set up and up to date to handle this data, though there are still technical issues
- Repository. Also common, though again technical issues and the need to upgrade from old versions.

A point was made about reporting (to HESA) with ORCIDs: there are no benefits to the academic and it is difficult to explain why it is being done, so for the time being participant is not doing it.

When registering new users, or processing leavers, it is important to do this regularly, as turnover is quite high.

What is the workflow for leavers? (no firm answer provided) (see above request for case study). It's expected that academics would care more that their new employer was registered as an affiliation than their old employer "removed". (note past employment can be entered on ORCID). In all cases where ORCIDs were managed in one system, there was extensive use/planning to use APIs to transfer data to other systems where the ORCIDs would be used, esp between CRIS, Institution Repository and HR system.

There was a question over how data that a user already has in local systems gets pushed to ORCID if the identifier is created after-the-fact: in both CRIS and Repo the expectation is that once you register your ORCID with that system, that it will push your data to ORCID. Does it? Authentication: can people log into local systems with ORCID, or into ORCID via local SSO? There's a general preference for the latter (single sign-on).

There was a lot of discussion about how permissions worked, and the level of control that users have over their data for searching/publication via ORCID. No specific actionable points came up. There was also a discussion over the provenance of data in a user's ORCID record, and how to differentiate between a definitive source (e.g. grant data from a funder) and a non-definitive source (e.g. grant data from an institution).

Would be good to have examples of how people are using/sharing the data could be made public for others to follow. [Notes from "Managing data tagged with ORCIDs" session](#)

Extending your community

1. *What groups were targeted in your initial recruitment?*

Initial recruitment begun mainly with research active academic staff and graduate students and was introduced in connection with REF compliance.

2. *Which proved to be the hardest to attract and why?*

It has proved relatively simple to spread the message within STEM subjects, but harder with other areas, particularly Arts & Humanities. A number of reasons combine to explain this difficulty, including 1) the much smaller perceived benefit due to lower rates of publication for most humanities researchers, 2) researchers with non-standard publication routes, which may not yet be digital at all, proving especially difficult to sell the concept to, 3) a generally greater degree of scepticism and resistance to the exercise as a whole from these subjects. Outright refusal to participate is an outlier phenomenon, but it is problematic when senior researchers take this stance

3. *Do you need to try new approaches to recruiting them?*

No silver bullet has been found thus far for A&H. It is largely a matter of just keeping working at it, though academic champions can be very useful. Such champions in A&H have been slow to emerge, however.

Institutional mandates to register for ORCID IDs do show potential in solving problems with stubborn departments/individuals and generally hastening uptake. However, there does need to be a form of follow-up to such policies in order to check compliance. Additionally, an institutional mandate is dependent on senior management priorities lining up with and being sympathetic to this goal. Furthermore, institutional mandate may be an unattractive route as it does not ensure that people see ORCID IDs as useful, understand their value and potential, keep their ORCID IDs up to date and, crucially, use them ... all of which are crucial to making ORCID IDs work.

Tying ORCID together with the REF can be a more successful approach, as people readily understand the importance of this. However, it is important to bring the use value of ORCID IDs to the forefront in the way they are promoted, as this is a better strategy than making it something onerous imposed on researchers.

A further aid to uptake and keeping ORCID IDs up to date would be greater automation, making ORCID fit into workflows more smoothly. It would be a particular aid to uptake in A&H if ORCID IDs could be incorporated better into monograph workflows.

4. *What new groups could you target (e.g. Postgrads, administrators, industrial and International collaborators)?*

There is not currently any strong effort to spread ORCID sign up beyond researchers into students and administrators

5. *Other Issues*

Though people may in some cases be quick to sign up, it is a frequent issue that they fail to keep their ORCID updated. There is currently no easy way to systematically track whether people are keeping up to date, and ORCID has not yet been embedded into workflows to the point where researchers generally think of their ORCID as something to habitually update when they publish.

The recording, storing and interlinking of ORCID IDs has brought up a variety of issues for IT systems needing to connect HR, student records and library systems in new ways, particularly, the relationship between ORCID IDs and the need to respect confidentiality.

Connecting ORCID more strongly with HR systems and collecting ORCID IDs as people join the university, rather than doing it later in a more manual way, would be helpful, as in many cases storing IDs in spreadsheets is currently the only option.

Breakouts - Embedding ORCID in the ecosystem

CRIS systems

- Most users were either Pure or Symplectic users, though there was a small number of Converis/Work Tribe users, and a couple using home-grown systems.
- Around 50% of the participants were already using ORCID in their CRIS systems
- The ability to push from CRIS to ORCID is desirable, but either the integration has not been done yet (Symplectic) or there are technical challenges getting it to work (Pure)
- Are staff successfully getting people to register *through* the CRIS?
 - with Pure, it used to be easy if you had the subscription; but that ability has been removed because of the way people used it. It is recommended therefore to create outside, and then bring in. However this creates the:
 - possibility of error if they are copying their details from outside
 - possibility to create duplicates if these are done in bulk by administrators.
 - Symplectic supports that approach. The key to doing it right is how the institution communicates it. Issues:
 - it is easy to wind up with orphaned/unclaimed ORCID
 - would a claim expiration period in ORCID be useful?
- Broadly speaking, bulk creation is no longer recommended by ORCID; if it is to be done as a convenience then it should only be done once near the start of the process.

Further [notes on the CRIS system breakout](#)

Institutional Repositories

Many users of and much discussion on EPrints in these sessions. EPrints specific comments can be seen in the raw [IR notes](#) and the [EPrints specific session](#) notes.

It is often not clear whether the right path is to offer registration via a CRIS, an IR, an identity/directory system or via single sign on. Different paths may be appropriate for different institutions. Offering registration through the repository “feels like a mountain” compared to the CRIS solution. But there are advantages if you can manage it.

If the repositories are to be used to push data to ORCID there are concerns about duplication and “creating another mess” – the ideal may be that the repository should not feed to ORCID unless it is data that is not already held elsewhere.

Widely requested is getting an authoritative statement of users who have already registered independently (via ORCID or via one of the many other routes – publisher, funder, learned society etc.). Has the user given a non-institution email address? Have they marked their contact details as private? Have they neglected to add affiliation or moved from another institution?

Standard plug-ins for most common repositories would be very useful.

Need for coordination so that locally-developed solutions don't break with upgrades and versions of the repository software. Currently seeing piecemeal approaches rather than a community agreed solution.

There are many different approaches to storing ORCID and different opinions on how to use them (e.g. where does a hyperlinked ORCID point – to ORCID system to local ID system to local repository or CRIS?)

Discussion comes back to the issue of ORCID and repository having different information and how the two way flow of information should work to avoid duplication and “mess”. Obtaining fuller information from ORCID might push repositories to widen their scope to start containing more than publication information (especially in the absence of a CRIS). There is a need to cater for (changing and multiple) institutional affiliations. The information exchange depends on the levels of privacy set by the individual – perhaps this should be more clearly explained when

individuals are setting their privacy levels in ORCID (the default is private and will therefore be selected by many users, perhaps the default should be different?).

Need for a central information store, system by system, on what needs to be done to implement ORCID within that system also what (local) changes and hacks have been made in order to get things working and how they are affected by updates/new releases. A timeframe for expected adoption of ORCID by the software suppliers would also be useful, again perhaps pulled together centrally. Standard or shared plug-ins would mean several developers are able to support each one. Group also recommended that JISC should be the point of focus for organising the developments for EPrints, to capture requirements and needs and drive things forward (similar to RIOXX). Additional recommendation to all EPrints users: join the EPrints user group which Lizz will promote on the ORCID-UK list. It would be helpful if ORCID system were able to export publications in bib format.

[Notes on the Institutional Repositories breakout](#)

Publisher Systems

At the moment, benefits are still largely hypothetical, or foreseen in future, though incomplete link-up between ORCID and publisher systems currently leads to ORCID sometimes being a better source of up to date information than publisher notifications.

Notification of acceptance and publication date is a key goal. The auto-updating of ORCID with publisher systems is the thing we would ask for most above all else. Even something as simple as being sent an email on acceptance would be a massive improvement, saving a huge amount of time and effort, though more sophistication would be welcome. At the moment these things must be tracked and managed manually, and automatic notification would be very helpful for managing embargoes.

Publishers mandating ORCID would be a huge assistance to ORCID uptake. In particular, it is vital for the success of ORCID that submission systems gather ORCID IDs for all authors, including co-authors, and put them into the DOI metadata and then on to ORCID. This would remove a huge amount of headache very quickly.

However, at the moment publishers do not seem to be moved to require ORCID for all authors. The UK is louder in pushing forward ORCID than most others, but international pressure is not yet at the point where publishers feel forced to action. There is a need to determine what the hinge point is which will move the whole system forward by that crucial step.

Alongside issues with budget and collective will, reasons for resistance among publishers may include that many small journals don't even provide DOIs as standard, let alone requiring ORCID. As a result, priorities for publishers may lie in bringing all their journals forward in more basic ways rather than pushing forward yet more new initiatives like ORCID. Different subject areas are moving at different rates here, small journals in the humanities tending to lag behind with peer reviews often offline.

On a related note, universities also have a key role in making ORCID work by pushing reliable institutional affiliation information, just as publishers add publications. The case should be made to publishers as to why ORCID would help them too, and likewise to institutions since ORCID provide a way of understanding much more clearly the total costs of publishing.

An impasse exists with peer review platforms which do not include ORCID IDs as a standard field, so publishers do not feel they can make it compulsory. Publishers and peer review platforms each feel they need the other to implement a mandatory ORCID field in order to do it themselves. There is a similar situation between Funders and Universities.

Jisc is in a good position to gather an international push on a specific program of points which could reasonably be demanded of publishers. An international demand will have more weight, Jisc could take a role in working towards more coordinating statements from various national

consortiums to push publishers into action. Regions differ in their approaches, requirements and what they seek to get out of ORCID, but the key thing is to see what the common use cases are and the common requirements. e.g. if publishers did these X number of things, everyone benefits. The demands of subscribers will likely have an important role in pushing publishers through the technical fatigue and on to full ORCID integration.

Funder Systems

Focussed on RCUK as Paul Wellington-Green was present.

The Monday before the workshop, RCUK had launched ORCID capabilities for Je-S, allowing people to include an ORCID in their Je-S profile which will then link that to any grant information and allow information to be pulled from ORCID. 'Phase 3' will deal with pushing the info back into ORCID' It's possible that a bespoke system could do that but it is not currently a priority development. There are huge amounts of old data, Je-S isn't something people regularly update. Peer review recognition is a very important issue for RCUK and it is hoped that widespread use of ORCID's will lead to reviewers being credited for their efforts. So the priority for "pushing" data to ORCID will be the data which is uniquely and authoritatively held on Grants and Peer Review. Data which could be pushed to ORCID will reflect what GtR (Gateway to Research) already makes public (grant ref, start, end date, grant amount etc.)

ORCID will be a way of checking/verifying affiliation. But only useful to check against "authoritative information" i.e. coming from the institution. Once affiliation processes are smooth then ORCID should encourage individuals to request verification from their institutions.

Key scenario is when researchers using ORCID move from one organisation to another. Ideally - organisation affiliation changes happen automatically. The aim is to use ORCID to link systems and build profiles not create lots of new empty profiles at ORCID.

ORCID will be integral to new RCUK systems, but RCUK won't be making changes on legacy systems, the last "legacy" move was integrating with Je-S.

ResearchFish – is considering pushing to and pulling from ORCID, but decision still to be made. (In view of comments about ResearchFish's interface being unpopular with researchers and research staff this would be a popular development).

RCUK role is to fund the best research. So RCUK are not currently intending to mandate ORCID's but to strongly encourage their use by explaining the benefits to researchers and institutions.. e.g. a grant application pilot to show people benefits when applying rather than having to create a unique CV time and time again; this will allow researchers to use their CRIS or ORCID to select from a list the publications/outputs/activities that they want to show.

We must recognise that as systems become connected through ORCID there will be issues of duplication/contradiction, but organisation should look at this as an opportunity to fix their own data, to go back to the source and figure it out/clean it up - it isn't ORCID that is making the mistakes, the mistakes were always there; ORCID will just shine a light.

ORCID *should* work in the background, but this wouldn't be an easily explained offer or an attractive interface for researchers - which is why it looks the way it does - in the future if automation and integration take off then there may be much less need for researchers to interact directly with ORCID and the interface may change.

Suggestion for ORCID Hack Day - could put gateway data back through API into ORCID

Learning Resources (VLEs, Repos, OERs, Wikipedia)

This session focused on the potential for using ORCID's in the wider ecosystem beyond research outputs (publications, data, conferences), which may be of value to a wide range of teaching and support staff and even to students as well as to funded researchers.

Academics should be encouraged to use their ORCID as part of their 'signature' whenever and wherever they publish content – which might range from presentation slide decks and lecture

notes to blog posts. It was noted that this can be helpful to the audience (readers, listeners) in signposting a lecturer's academic profile and interests. Examples of types of publication include

- Best Practice material – e.g. for the National Teaching Foundation
- Professorial and Public Lectures
- Exhibitions – whether work in an exhibition, or curating an exhibition
- Video covering such as performance analysis

In terms of growing the web of cross-referral, especially by leveraging the work of search engines such as Google, it will be particularly useful to include ORCID in social media creator profiles which will be automatically harvested; for example Flickr, LinkedIn, Slideshare, Twitter, Youtube.

This is entirely in keeping with the intent of ORCID in relation to 'works', which is certainly not restricted to formal research outputs. ORCID supports an extensible schema of specified 'work types' with the opportunity to add 'others', in effect a taxonomy combined with a folksonomy. These tactics not only help build the web of related data, but also provide an audit trail for evidencing

- Research impact beyond formally peer reviewed publications
- Public outreach as required by some funders

Wikipedia and Wikidata offer specific opportunities for propagation:

- Citation as an author – the author template can contain not only VIAF and ISNI but also an ORCID
- Citation of ORCIDs for individuals who are the subject of or mentioned in articles; Andy Mabbett, the ORCID Wikipedian, offered to do editorial corrections to existing biographical entries if provided with a Name and their ORCID
<https://orcid.org/blog/2016/01/15/meet-our-wikipedian-residence-andy-mabbett>

Looking to the future, it is likely that ORCIDs will be capable of validation using the Wikidata database.

It is also worth considering citation of ORCIDs as part of the personal credentials in such as email signatures / footers and printed business cards (as at the Royal Society for Chemistry). The latter presents a useful opportunity to get high level recognition for ORCIDs amongst university senior managers and administrators. Conversely researchers should be encouraged to reference their personal web page (ideally as provided by the university) in their ORCID profile.

Finally the group considered the value of encouraging adoption of ORCIDs in the wider university community in order to cultivate practice – notably postgraduates and even undergraduates. It was noted that there may be easy acceptance of this approach amongst younger generations who will readily sign up for programmes in order to explore their value (rather than because the value is proven) – as illustrated at Northumbria and some US universities.

Enterprise Admin Systems (HR, Directory Services, Student Registry)

Quote from Torsten Reimer *"I would suggest to add ORCID to a system that gives researchers direct benefit, and to only add it to systems if and when there is a clear business need. For example: if you do not plan to report on ORCID through the HR system, then why implement ORCID there right now? The key for success with ORCID is to ensure academics understand and use ORCID."*

<http://wwwf.imperial.ac.uk/blog/openaccess/2016/03/21/how-to-implement-orcid-at-a-university/>

What are "Enterprise Admin Systems". Loosely defined but generally agreed to include:

- Identity management systems - may be related to directory services
- Finance, Payroll and HR
- Stand alone or integrated award management system? Matrix?
- Directory services
- Students database/registry system?

If you have decided to register and/or collect ORCID IDs then you need to decide where the ORCID IDs should be captured/generated. Many institutions do not have integrated systems or the connections between different systems are poor. There are many different models of connecting ORCID IDs to institutional IDs (or not) and passing them to other systems (or not). There is an important difference between where and how you present to researchers the capture/generation of ORCID IDs and what then happens behind the scenes. It is important to engage with the system that that researchers are engaged with. Some researchers don't identify with university but the research group. Others will be concerned about a risk of ORCID being managed centrally (not the CRIS or the Repository) ... clarity and good policy on data stewardship is vital. Obviously it is vital to get the correct permissions from individuals at the time of registration/collection. HESA returns – currently it is recommended (it is very possible that in future years it will be mandatory) to supply ORCID IDs for staff and researchers.

In larger institutions it might be better to think about embedding ORCID in the identity management system (with a view that all the other systems will interact with it). This is the place where users manage their identities and could include ORCID. Laure Haak says that ORCID will be able to facilitate this with the new institutional sign-on.

Store, share, exploit, manage. Think about these functions when you want to implement ORCID workflows throughout the institutional systems.

When people join institution - get ORCID sign-on done then....get it done early. Sell it as a portable profile (Carrot)... and show examples.

Things for Jisc team to consider:

- How systems pass ORCID IDs between them. Generate case studies.
- Off the shelf module for smaller universities to provide ORCID sign up for new staff.
- Look at how repository software can pass ORCID IDs to HR systems. Case studies of how people have done it would be useful.
- Vendors capabilities – Topic to raise with UCISA and RUGIT? ORCID may possibly be talking to them so coordinate approach.

Recommendations for Actions

(Feedback from the breakouts and responses to key issues)

- Because CRIS systems were in position pre-ORCID being embedded, therefore low hanging fruit may be to integrate researcher's interaction with ORCID into the CRIS.
- Many Eprints users use Eprints via a managed service, so can't support ORCID until the service supports ORCID. Action via Eprints user group needed to have a coordinated approach. More than one way to use ORCID IDs in Eprints. Community needs to act together to make things happen (e.g. collaborating on resource for development, agreed ways of implementing ORCID IDs in IR).
 - Can extend these questions to other IRs - same issues
- Community needs to define standard ways of interoperating which can be adopted across systems and institutions. Much of the value offered by ORCID IDs is in the area of interoperability and standards.

- Benefits of ORCID membership needs to be made clear (or disadvantages of not being a member!)
- Need ability to: Store / share / exploit / manage ... Think in terms of future capabilities not what they currently are . .
- Some publishers requiring ORCID's ...
 - Ability to push updates 'at point of acceptance' is a big plus (and key for REF).
 - Publishers need to be offering this for all authors & publications
 - European publishers may not be so interested in REF requirements, but many other use cases - call to action to Jisc: the UK on its own is an important but not critical market for publishers - so need to work with communities in Germany, Italy, Spain, France, etc. etc. to come up with common requirements that can be presented to publishers and give them incentives to support ORCID and related functionality
- Need to consider who is the 'authority' for different types of data?
 - Funder systems are source of authoritative data on grants and peer review
 - Universities will be authority on affiliation
 - ORCID exposes poor quality data - opportunity to fix this
 - Need the 'authority' systems to be pushing data to ORCID so it can then be shared
- We may be guilty of using/seeing ORCID in ways which are not intended
 - ORCID may move more into the background as our use of it becomes more mature
 - Once ORCID is part of the landscape, why would you ever want to go to the ORCID site - the data will be flowing around the systems once you give the ID
- How can things that are outside traditional research outputs benefit from ORCID's, and how can ORCID benefit from engagement with people producing these non-traditional outputs
 - E.g. specialist music & art colleges
 - Get ORCID into profiles outside the institution - LinkedIn, YouTube, Slideshare,
 - Get ORCID on your business card? Royal Society of Chemistry doing this
 - Embed ORCID in the web and in the wider environment
 - Get ORCID's in Wikipedia - many staff in a University will have Wikipedia page - and the Wikipedian in Residence at ORCID (Andy Mabbett, @pigsonthewing) can provide some support for getting this to happen
 - ORCID supports 'other' types of work which can enable recording types of 'publication' or creation which don't fall into the traditional research output categories

Laure Haak summarised the day, thanking all participants for their honest and enthusiastic participation and saying that this level of community participation and engagement is inspiring and in line with the ORCID vision that every expression of knowledge – in whatever form it takes – should be connected to the people who created it and the places and spaces where the ideas were developed. She responded to researchers' concerns that the service could be "sold off" in the future to a commercial publisher by emphasising that ORCID is independent and cannot be sold. ORCID Inc. is a not-for-profit 501(c)3 organization registered in the United States. As such, it is subject to laws of the US Internal Revenue Service that specify that it cannot be purchased or otherwise managed by a commercial entity. Laure has since written a blog on the principles behind ORCID and the way it proposes to earn the trust of the research community:

<http://orcid.org/blog/2016/08/16/orcid-we-wont-be-sold>