



# I'm a Member, Now What?! – Help & Support

*28 July 2022*

## ORCID's Mission

ORCID's mission is to **enable transparent and trustworthy connections** between **researchers**, their **contributions**, and their **affiliations** by providing a **unique, persistent identifier** for **individuals** to use as they engage in **research, scholarship, and innovation activities**.

# What are we covering in this session?

# Session outline

- General support and resources
  - Channels and help center
  - Newsletter
  - Our Member Technical Support Specialists team
- Specific support for Consortia Members
- Specific support for Direct Members
- Integrating with ORCID
- Product information
  - What does product do?
  - How are features developed?
  - How can we work together?
  - Where can I find your API documentation?
- Q&A

**Who will be talking to you  
today?**

# Presenters



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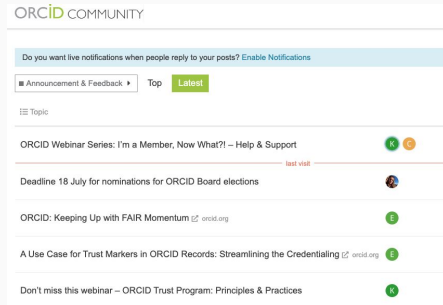
# Support and resources

# Finding answers, feedback and exchange

ORCID has a wide range of information and community sources, check them everytime you need it

## Community Forum

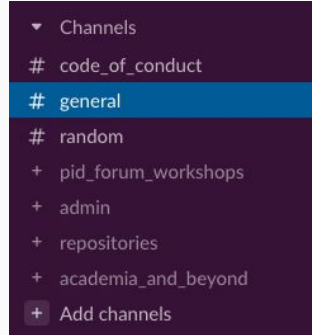
Use the channel “Announcements & Feedback” to check latest news and interact with other members



<https://community.orcid.org/>

## Friends of ORCID (Slack)

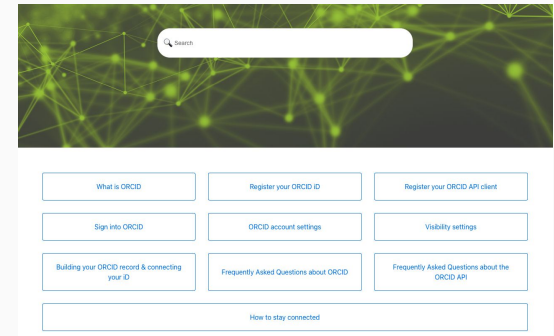
Interact with other members, provide and get feedback, get information



<https://friends-of-orcid.slack.com>

## Help Centre

Access information and FAQs pool (both technical and non-technical)





<https://support.orcid.org/hc/en-us>



# Don't miss our Newsletter (Member Connect)

A monthly **newsletter** for ORCID's member community No images? [Click here](#)





**ORCID**  
Member Connect

A monthly newsletter for ORCID's member community.

Welcome to the June edition of ORCID's Member Connect! This month, we're excited to share some useful information:

- **Just a few weeks left for nominations for 2023 Board elections.** We're asking for help to nominate yourself or a colleague, or to spread the word.
- **FAIR Data Principles are gaining momentum** in the research ecosystem; learn how ORCID is keeping pace.
- **Big improvements to the ORCID registry** on the horizon, including improvements to co-author workflows.
- **Heightened security protocols for our OAuth integration clients** will be implemented soon. Learn what you need to do.
- **We'll soon launch an in-registry "wizard"** to help users set up and optimize their records.
- **Korea Institute of Science and Technology Information (KISTI) will soon support auto-updates.**

- Monthly newsletter for members
- Main ORCID news from that month
- Technical announcements
- Upcoming releases and improvements
- And much more

# What can MSTS do for you?

Our **M**ember **S**upport **T**echnical **S**pecialists (MSTS) are also here to help.

Our two-member MSTS team will:

- Issue your Sandbox and Production credentials
- Review or assist reviewing your integrations
- Answer Institutional sign-in questions
- Support you with complex API errors and API-related technical issues

# Getting support as a consortium member

# What are ORCID consortia?

An ORCID consortium is a group of five or more not-for-profit organizations that band together to form a community of practice that can apply ORCID services and resources in national contexts, using global implementation standards.



# First steps as a consortium member

- Send your consortium lead the internal documentation they ask you for (variable from consortium to consortium with no input from ORCID)
- Send your consortium lead your contact details and organization description for ORCID's internal set-up
  - Members page <https://orcid.org/members>
  - Member portal <https://member-portal.orcid.org/>
- Get an onboarding call with your consortium lead to discuss:
  - General questions
  - Plans with ORCID (use tools, integrations with the API, etc.)
  - Available resources

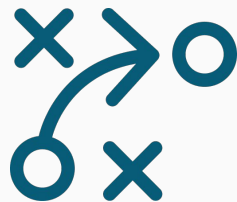
# Working with your consortium lead



**Regular  
exchange**



**Information about  
your integration  
and discussion  
about next steps**



**Escalation to  
ORCID**



**Work with  
other  
consortium  
members to  
find common  
solutions and  
approaches**



**Participate in  
consortium  
events and  
community  
calls**

# Getting technical support



## The consortium lead

- Answers Tier 1 (basic) questions from member organizations
- Escalates complex questions to ORCID
- Monitors member integrations including updates to existing integrations
- Helps to review member integrations following [ORCID best practices](#)

## ORCID

- Indicates relevant resources for the consortium
- Registers and provides [API credentials](#)
- Helps with complex [API errors](#)
- Provides updated technical documentation
- Has dedicated staff for complex technical support

# Getting support as a direct member



# Direct Members

- Your Engagement Lead is the contact point for you in terms of all ORCID related activities!





# Support and Benefits for Direct Members

- ORCID's membership fees are designed to ensure we remain financially sustainable and can support the necessary ongoing investment to achieve our mission and to deliver value
- As an ORCID member organization you will receive the major benefits and support as summarized.

Direct implementation support from the ORCID team (technical and outreach)

Adding information to the ORCID Registry via Member API

Onboard with a virtual orientation customized to your organization's needs

Member reports

Participate in ORCID member-only events such as town hall meetings

Use of ORCID member logo

Nominations and voting for the ORCID board (see our bylaws)

[See: https://info.orcid.org/membership/](https://info.orcid.org/membership/)

# How to fully benefit of your Membership?

- First and foremost - integrating with ORCID via your Member API!
- And, not only having an integration, but to have (an) integration(s) that connect information to the ORCID registry - building Trust Markers

- Trust Markers include:
  - **Affiliations** added by **research institutions**
  - **Works** (e.g. articles) added by **publishers** and **repositories**
  - Links to **other person IDs**
- The provenance of each assertion is indicated in the ORCID UI and API responses
- Read more about this in our latest blog post:  
<https://info.orcid.org/a-use-case-for-trust-markers-in-orcid-records-streamlining-the-credentialing-process/>

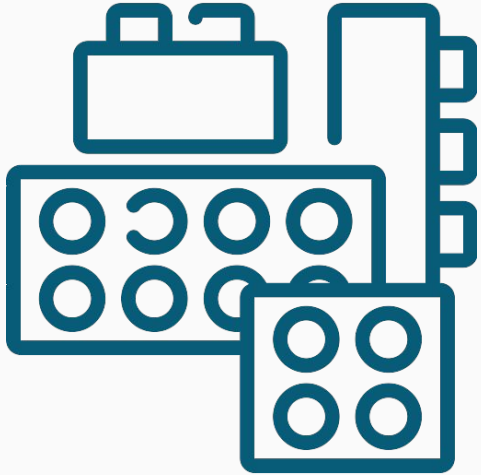
# Integrating with ORCID

## Three easy steps to integrate with ORCID

- 1) Plan how your integration will work (which workflow(s)?)
- 2) Build your integration
- 3) Communicate: Design and share the connection points

**Integrating with ORCID is how you will get the most out of your membership**

# Implementations



Integrating the ORCID API

+



Engaging your community (faculty, staff, students, grant awardees...)

# What does ORCID's Product team do?

# Product responsibilities

The product team is responsible for the **ongoing evolution of ORCID services**. We work with the community to **define the features we provide** and **the order that we build them in**. We make sure that:

- Our development is aligned with our strategic goals
- Our services are valued by our stakeholders
- Our work furthers the ORCID mission and is consistent with our values.



# Wait... What's the product?

**The services** we offer to researchers, members and third party integrators. **Anything that faces the end user** is considered part of the product:

- The ORCID Registry, including OAuth, UI and API.
- The Member portal, including Affiliation manager and Member reports
- Data files (lambda, member file, yearly file)
- Notification mechanisms (API notifications, emails to researchers)
- Product documentation

# 2022 Objectives

We will strive to:

- **Better understand and define best practices**  
so that our members and service providers have higher quality integrations
- **Increase incentives to participate**  
in order to drive adoption and data quality
- **Work out what is valuable to the community**  
so we can build the right things in 2023

# How are features developed?

# Product development

We work across the organisation to build the **right solutions to the right problems** and **prioritise development** in a way that **balances the needs of all**. We design user interfaces, journeys and workflows that help **get the maximum value out of the ORCID registry**.

- Solicit and refine requirements,
- Specify changes to the registry,
- Manage the product life-cycle
- Measure the impact of change.

# Agile working

The Product and Technology teams break down large tasks into small parts and work together to deliver 'increments' of value. We use an agile methodology called 'scrum'.

Put another way, **we make a series of small improvements every three weeks** or so, that help move us towards larger goals.

# Goal setting and deadlines

We set ourselves realistic goals with the understanding that they might not be achieved, but that **we make visible and useful progress** towards them.

Deadlines are counterproductive and lead to poor quality services. We are continually trying to improve our processes so that we are more productive and predictable and can **provide better estimates** of when things will be delivered.

# How can we work together?

# Working with the product team

The product team works with the community to understand how we can provide a better service and make ORCID easier to use.

**Your help is super important** - we want to solve the problems people actually have, not the problems we think they have.



# Contact points

Product development starts with a problem that needs to be solved. There are a number of places these problems can be discussed with ORCID staff:

- The Consortia Interest Group - a great place to start
- Directly with your engagement lead, who will escalate as needed
- Product Webinars
- Product feedback surveys
- Product workshops

# Understanding requirements

All requirements have a who, a what, and a why. **Who does it help, what does it do, and why do they want it?** With these basic elements we can start to prioritize.

We have limited resources, so we must be careful to commit them to the most valuable things. We start by examining the **projected impact, effort required, strategic fit** and also our current development context.

There are many factors to consider before we can start building.

# Prioritisation influences

- How many users will find the work useful?
- How much value will they derive?
- How feasible is it to build?
- Does it save people time?
- Will it make things easier?
- How much effort will it take to deliver?
- Is it the most valuable thing we could be working on?
- Is there an ongoing maintenance cost we can afford?
- Will it be adopted?
- Is it interoperable?
- Does it depend on others, and are they committed?
- Does it have a long term future?
- Will our users understand it?
- Is the community ready for it?
- Does it line up with our values?
- Does the work move us towards our strategic goals, and ultimately our mission?
- How confident are we of our answers to these questions?

# What are we working on?

# Current activities

- Accessibility audit and improvements
- Collaborator and co-author improvements
- New user experience improvements
- Data model evolution and API 4.0

# Where can I find your API documentation?

# API Documentation

- Infosite
  - Services
  - Workflows
  - Tutorials
  - Integration guides
- GitHub
  - Tech tutorials
  - Schema
  - XML examples

# API User Group

<https://groups.google.com/g/orcid-api-users>

- Anyone can join the group
- Ask questions on general API queries
- Respond to questions :)
- Planned and unplanned outage updates



# Getting direct help and support

Situation	Main point of contact
If you are a <b>consortium member</b> ...	get in touch with your <b>consortium lead</b> . They are willing to help!
If you are a <b>direct member</b> ...	get in touch with your <b>ORCID engagement lead</b>
For <b>user-related questions</b> ...	contact <a href="mailto:support@orcid.org">support@orcid.org</a>
For <b>issues</b> with your <b>integrations related to the ORCID API</b>	contact <a href="mailto:membersupport@orcid.org">membersupport@orcid.org</a> together with your main point of contact
For issues with your integrations related to your vendor system	contact your vendor system in the first place



Thank you for your attention

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