Pure-ORCID Integration

12th September, 2022
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Overview

1. Introduction to Pure
2. Current functionality in Pure
   1. Export: Personal User & Administrator
   2. ORCID as an import source
3. Improvements to ORCID functionality in Pure
   1. Latest Improvements
   2. Planned improvements
A Research Information Management System (RIMS)

from cataloging publications

….to cataloging research assets

Publisher

Grants

Funders

Departments

Collaborating researchers

Publications

Collaborating universities

Projects

Journals

….and so much more……..

Credit: Scott Warren, AUL Syracuse University, USA
Pure records data across the research lifecycle

Insight in funding success rate helps to manage improvement.
Integrating Disconnected Data Sources

Disconnected Data Sources

Complicates research management, administration and networking and collaboration

<table>
<thead>
<tr>
<th>Multiple IDs</th>
<th>Unique IDs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disparate information</td>
<td>Structured information</td>
</tr>
<tr>
<td>Disconnected data</td>
<td>Interconnected data</td>
</tr>
<tr>
<td>Non-homogeneous data</td>
<td>Homogeneous data</td>
</tr>
<tr>
<td>Available at high cost in FTE</td>
<td>Available at low cost in FTE</td>
</tr>
</tbody>
</table>

Pure Integration

Simplifies research management, administration and researcher networking and collaboration
Importing Data from Multiple Channels

Pure is designed to capture data from a wide selection of internal and external sources.
Benefitting from Our Unmatched Expertise

- Pure is the leading globally available commercial RIM solution provider
- 300+ RIM systems implemented to date, and is used in 47 countries
- More than 500,000 researcher and faculty member profiles have been created in Pure
- 20 years of development and improvements to keep up with market requirements/demands (SDGs, Open Access, Covid19), compliance, etc.
- Superior customer service
- Dynamic communities: Pure conference, User groups, Pure Academy & Slack group, Webinar series

Source: euroCRIS & OCLC Survey 2018
Pure Use Cases

The Pure platform is a complete RIM system that aggregates all research information from an institution.

- Organizational units
- Persons
- Activities
- Research output
- Patents
- Data sets
- Prizes
- Impact
- Press/media
- Funding opportunities
- Applications
- Awarded grants
- Facilities/Equipment
- Courses taught

Pure Reporting provides better research transparency based on different audience needs.

- Outcomes
  - Performance dashboards
  - Customized performance reports
  - Research grant income success rates
  - CV information
  - Open Access management

The Pure Portal enables you to create websites that engage key audiences with curated content.
The Pure Community module brings data from Academia in Israel together and helps understanding the full impact of community research

- Share data within communities of cross-collaborating institutions
- Imports high-quality, validated data directly from institutions
- Allows institutions to choose the data they share
- Identifies top cross-community collaborators
- Interrelates data from multiple institutions to produce complete findings
- The Community Portal provides a single and uniform showcasing of research across Universities
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ORCID integration in Pure

• ‘Basic’ synchronization
  • enables individuals to create their ORCID ID directly from Pure, and links the individual’s profile with their ORCID ID

• ‘Advanced’ synchronization
  • enables Personal Users to authorize Pure as a ‘trusted organization’ and export content to ORCID.
  • the following content can be exported to ORCID:
    • Personal identifiers (Scopus Author ID, Researcher ID, Digital Author ID)
    • Organizational affiliation information
    • Pure Portal URLs (if enabled in the configuration)
    • Research outputs
Enable export to ORCID (admin)

- For Personal users to export content to Pure, the Administrator or Editor must enable the ‘Export to ORCID’ functionality in Pure

1. Enable ‘Export content to ORCID’

   Export to ORCID

   Enable export of Pure content to ORCID

   Select whether or not to allow Personal users to choose to export Pure content to ORCID. Content that will be synchronised includes Research outputs (Published/ePub ahead of print + Publicly visible + Workflow step as configured below), Affiliation details (Institution + Country/Territory + City, as per configuration below), Other IDs (Scopus Author ID, Researcher ID, Digital Author ID), and the Pure Portal URL (if selected below).

   Export content to ORCID

   - On
   - Off

   Include former persons

   - On
   - Off

   If disabled Pure will not synchronise Pure content for former persons.

   Publications

   Change settings for which publications are exported to ORCID.

   Allowed publication status

<table>
<thead>
<tr>
<th>Selected publication statuses</th>
<th>Remove all</th>
<th>Available publication statuses</th>
<th>Add all</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-pub ahead of print</td>
<td>In preparation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Published</td>
<td>Submitted</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accepted/in press</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Unpublished</td>
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</tbody>
</table>

   Pure will only export publications to ORCID if they have one of the selected publication statuses.

   Effective workflow step

   - Validated

   Research output prior to this workflow step are not sent to ORCID.
Enable export to ORCID (admin)

2. **Enable ‘Send Pure Portal URLs to ORCID’**

3. **Set Root Organization**

4. **Configure ORCID mapping file**
   (Pure Research Output types are mapped to the ORCID Work types as per the default mappings, but this can be replaced by custom file)
Enable export to ORCID (admin)

• If Pure Portal URLs are enabled, the individual’s Pure Portal URL will be visible as a hyperlink in the individual’s ORCID page.
Enable export to ORCID (admin)

• The export to ORCID includes institutional affiliation information: a Root organization must be set (N.B. this should include Country and City!)

• The Root organization will appear in the individual’s ORCID record as their institutional affiliation.
Export to ORCID (personal user)

• Once the ‘Export to ORCID’ is enabled, Personal Users can authorize Pure as a ‘trusted organization’ and export content to ORCID

• To export content to ORCID, users must have an ORCID ID that is registered in Pure:

  If no ORCID ID is registered, from your personal page you must create and connect an ORCID ID

  If you have an ORCID ID, you can authorize Pure as a trusted source (if your ORCID ID is not registered you must do this first)

• The following content can be exported to ORCID:
  • Personal identifiers (Scopus Author ID, Researcher ID, Digital Author ID)
  • Organizational affiliation information
  • Pure Portal URLs (if enabled in the configuration)
  • Research outputs
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Latest improvements in the last couple of years

- Added detailed affiliations of researcher and option to export all:
  - Department
  - Role
  - Start/End dates added

- Made document states that can be pushed to ORCID configurable

- Updated sync configuration option to exclude former persons
ORCID as an import source

• Personal users can import their research outputs from ORCID to Pure:
Planned Improvements

• Planned improvements starting from version 5.26 (expected for Q1 2023):

  • Update the ORCID API v3

  • Import and export:
    • Datasets and Activities at first stage
    • Followed by Software, Grants & Projects
    • Expand Self-import for new content types
Pure integration with ORCID benefits

- **Re-use of information** – researchers only enter information once and this information is re-used for multiple purposes and systems – *Effort and time saving!*

- **Automatically update and keep researchers’ profiles available** – Streamline profile maintenance by automatically updating information on both systems
Thank you!