Esploro

# How to Push Researcher Assets to ORCID

Your Esploro-ORCID integration can now push approved research assets from Esploro to a researcher’s ORCID profile. This keeps their public ORCID profile up-to-date automatically.

To learn about ORCID and its integration, we recommend starting with the video: How to Set up ORCID Integration in Esploro.

In this video, we will cover the new fields of the integration that are specific to pushing assets. We will also go over the pre-conditions for the asset integration to work correctly. There are pre-conditions on the Institutional level, the Researcher level, and the Asset level.

On the institutional level,

-Your institution must be a member of ORCID. You will need your Cilent ID and Client Secret from ORCID for the integration.

-The Esploro\_Orcid\_integration parameter must be set to True. This can be found in Esploro configuration > General>institution settings.

-The OCID integration must be configured. Here’s how to do that:

In Esploro Configuration, open Repository > Integrations: ORCID Integration.

Most of these fields are explained in the video How to Set up ORCID Integration in Esploro.

For Send Assets – the out of the box value is No. If you would like assets to be pushed to researchers’ ORCID profiles, change this to Yes.

After selecting Yes, choose the categories and types of assets to be pushed. You can choose to send all assets to ORCID. Or you can choose categories of assets, or specific types of assets.

Remember to Save.

The integration is now configured, but the assets will not be pushed to ORCID until the Update researcher's ORCID job is run. You activate this scheduled job when you are ready for it to run daily.

In the Esploro Research Hub, open Admin > Manage Jobs and Sets > Monitor Jobs. Click on the Scheduled Jobs tab. Find Update researcher's ORCID and move the toggle switch to Active.

If you would like to be notified when the job runs or fails, click the row action button and select Email Notifications, where you can add subscribers by user or by email address.

If you open Job History, you can view the job report, which shows a summary of the researchers updated.

You can also view the events, which include errors that were received from ORCID.

When all of this is set up for your institution, the integration will work for researchers who opt-in.

To do that, a researcher must have an active profile in ORCID and they must authorize access for Esploro to make changes to their ORCID profile.

You can see if a researcher has authorized access by looking on the sidebar of the researcher’s record. A researcher who has granted access will show ORCID status: Active. You can also see the ORCID synchronize date, which shows the last time the update job was run for this researcher.

On the Asset level, the only assets that will be pushed to ORCID are those of the categories or types specified in the integration, and only those that are approved and visible on the Researcher’s Esploro profile. You can check an asset’s visibility by clicking Edit and checking the visibility section.

To review:

On the institutional level, the integration must be configured, and the scheduled job must be active.

On the researcher level, the researcher must authorize access for Esploro to update their ORCID profile.

On the Asset level, assets must be approved and visible.

That’s How to Push Researcher Assets to ORCID.