How to Retrieve Assets from ORCID for a Set of Researchers

Some researchers at your institution may already have a comprehensive list of their research outputs on their ORCID profile. If the preconditions for ORCID integration have been set up, then you can import those research records from ORCID to the researchers’ Esploro profiles. You can do this efficiently and accurately, even for several researchers at once.

There are several preconditions for ORCID integration, including ORCID membership for the institution, configuration by the institution, and consent from each researcher for their information to be shared between Esploro and ORCID. Learn more in these other videos about ORCID integration:

How to Set Up ORCID Integration and

How to Push Researcher Assets to ORCID.

This video will demonstrate how to pull research records for a set of researchers from ORCID into Esploro, which has two main steps.

1. Run a job to retrieve the record identifiers from ORCID
2. Load the research assets into Esploro using Smart Expansion

Step 1: Run a job to retrieve the record identifiers from ORCID

As with all bulk jobs, start by creating the set of researchers for whom you want to retrieve research records from ORCID. Each Researcher in the set must have an ORCID ID and an ORCID token. To display all eligible researchers, filter Researchers with the Settings flag “Has established trust with ORCID.” This will give you a list of researchers who have consented to have their information shared between Esploro and ORCID.

After creating a set of researchers, from the Admin menu select Run a Job. Select Retrieve ORCID Profile with list of assets for Researcher. Click Next. Select the set of Researchers. Click Next, and then click Submit. Click Confirm. Open the History tab. When the job has completed, click the Name to open the Job Report. Here you will see the number of Records exported and a Link. Click the Link, then click the Name to download the file.

Here is what the file looks like. It has columns for the User ID, Title of the asset, DOI, and PMID. The other metadata will be populated in Step 2.

Step 2: Load the research assets into Esploro using Smart Expansion

Smart Expansion takes a list of a researcher’s publications and adds them to the researcher’s Esploro profile as assets along with all the relevant metadata. All authors will be matched with researchers in your Esploro system. Smart expansion will only add records that are not already in your Esploro database. Now that you have the file from ORCID, open the Repository menu, and under Smart Harvesting, select Manage Profiles. Select the profile Comma Separated Values (CSV)/Excel File.

Choose parameters as you would for any other Smart Expansion or Smart Harvesting profile. Learn about the options in the documentation and in other training videos in the Knowledge Center.

Update “Last Smart Harvest Date” means that ongoing Smart Harvesting will only search for publications for these researchers from this date forward. This may be a good choice if the list of records from ORCID is expected to be complete. If you still plan to add more assets for the researchers via Smart Expansion or a retrospective Smart Harvesting, then uncheck this.

Select the file you downloaded in Step 1. Click Run Now.

When Smart Expansion has finished, you will see the approved assets fully populated on the Researcher profiles.

That’s How to Retrieve Assets from ORCID for a Set of Researchers.