

ORCID Integration

- [Recommended Approaches](#)
 - [Self Service Linking Enrollment Flow](#)
 - [Self Service Signup Flow](#)
- [Alternate Approaches](#)
 - [Administrator Search Enrollment Flow](#)
 - [Administrator Search and Link](#)
 - [Manual Data Entry During Enrollment \(Not Recommended\)](#)
 - [Manual Data Entry By Administrator \(Not Recommended\)](#)

There are several approaches available for integrating Registry with [ORCID®](#), starting with Registry v2.0.0. Currently, these all are designed around the ORCID iD itself, and not other parts of the ORCID record, though additional capabilities may be added in future releases.



If you plan on exporting the ORCID iD to a [provisioning target](#), keep in mind you probably need the ORCID iD to be attached to the CO Person record. (The [LDAP Provisioning Plugin](#), however, can read an ORCID iD attached to an Org Identity.)

Recommended Approaches

Self Service Linking Enrollment Flow

This flow allows an existing CO Person to attach an ORCID to their Registry record.

1. Configure the [ORCID Source](#) plugin, if not already done. For the ORCID to be copied to the CO Person record, the ORCID Source must be attached to a Pipeline with the following configuration:
 - a. Match Strategy: Do Not Match
 - b. Sync Strategy: Sync on Add, Update, Delete
 - c. Create CO Person Role Record: No (unticked)
2. Create a new [Enrollment Flow](#) with the following settings:
 - a. Status: Active
 - b. Email Confirmation Mode: None
 - c. Petitioner Enrollment Authorization: CO Person
 - d. Enable My Identity Shortcut: Yes (Registry v3.2.0 and later)
 - e. Pipeline: None
 - f. Identity Matching: Self
 - g. Terms and Conditions Mode: Ignore
3. Do *not* add any Enrollment Attributes. (You will be asked to add one by default, simply page back or follow the breadcrumbs to skip it.)
4. From the Enrollment Flow configuration page, click *Attach Org Identity Sources*.
5. Click [+ Add Enrollment Source](#)
 - a. Organizational Identity Source: Select the ORCID Source you previously configured
 - b. Org Identity Mode: Authenticate

Prior to Registry v3.2.0, CO Participants can now link their own ORCID record by logging into Registry and selecting *Enroll >> Your ORCID Enrollment Flow*. For Registry v3.2.0 and later, the link is *My Identity >> Available Enrollment Flows >> Your ORCID Enrollment Flow*.

Self Service Signup Flow

This flow allows the collection of an ORCID as part of an initial enrollment (ie: for someone who does not yet have a CO Person record).



This flow requires Registry v3.2.0 or later.

1. Configure the [ORCID Source](#) plugin, if not already done. For the ORCID to be copied to the CO Person record, the ORCID Source must be attached to a Pipeline with the following configuration:
 - a. Match Strategy: Do Not Match
 - b. Sync Strategy: Sync on Add, Update, Delete
 - c. Create CO Person Role Record: No (unticked)
2. Create a new [Invitation Enrollment Flow using EnvSource](#).
3. From the Enrollment Flow configuration page, click *Attach Org Identity Sources*.
4. Click [+ Add Enrollment Source](#)
 - a. Organizational Identity Source: Select the ORCID Source you previously configured
 - b. Org Identity Mode: Identify

Alternate Approaches

Administrator Search Enrollment Flow



Administrator driven ORCID linking is subject to error since it is not possible to strongly authenticate the appropriate record. Self Service linking is strongly preferred.

1. Configure the [ORCID Source](#) plugin, if not already done. The ORCID Source must be attached to a Pipeline with the following configuration:
 - a. Match Strategy: Do Not Match
 - b. Sync Strategy: Sync on Add, Update, Delete
 - c. Create CO Person Role Record: No (unticked)
2. Create a new [Enrollment Flow](#) with the following settings:
 - a. Status: Active
 - b. Petitioner Enrollment Authorization: CO or COU Admin, or CO Admin
 - c. Pipeline: None
 - d. Identity Matching: Select
 - e. Terms and Conditions Mode: Ignore
3. Do *not* add any Enrollment Attributes. (You will be asked to add one by default, simply page back or follow the breadcrumbs to skip it.)
4. From the Enrollment Flow configuration page, click *Attach Org Identity Sources*.
5. Click [+ Add Enrollment Source](#)
 - a. Organizational Identity Source: Select the ORCID Source you previously configured
 - b. Org Identity Mode: Select

CO(U) Administrators can now link ORCID records on behalf of their users. To do so:

1. Start at *Enroll > Your Admin ORCID Enrollment Flow*.
2. Select the CO Person you wish to add an ORCID record link for.
3. Select the *ORCID Source*.
4. Search for the appropriate ORCID record.
5. View the ORCID record.
6. Click [+ Add New Org Identity From Source and Link To Petition](#).

Administrator Search and Link



Administrator driven ORCID linking is subject to error since it is not possible to strongly authenticate the appropriate record. Self Service linking is strongly preferred.



This approach will result in an ORCID iD attached to an Org Identity, and assumes an existing CO Person record.

1. Configure the [ORCID Source](#) plugin, if not already done.
 - a. The ORCID Source cannot be attached to a [Pipeline](#), as there is not currently a way to automatically connect the new Org Identity record to an existing CO Person using this method.
2. Go to *People >> Organizational Identities*.
3. Click [+ Add New Org Identity From Source](#).
4. Search for the desired ORCID record.
5. View the ORCID record.
6. Click [+ Add New Org Identity From Source](#).
7. After the Org Identity is created, find the desired CO Person record.
8. Click [+ Link](#) in the *Organizational Identities* section.
9. Find the Org Identity you just created, associated with the desired ORCID iD.
10. Click *Link*.

Manual Data Entry During Enrollment (Not Recommended)



ORCID [recommends against](#) having users type in their ORCID iD.

1. Configure a self signup [Enrollment Flow](#) and define one of the attributes to be *Identifier (ORCID iD, CO Person)*.
2. Note that after collection, it is not currently possible for a user to update the identifier. ([CO-1255](#))

Manual Data Entry By Administrator (Not Recommended)



ORCID [recommends against](#) having users type in their ORCID iD.

1. An Administrator can add an ORCID iD to an existing CO Person record by visiting the appropriate CO Person page and clicking [+ Add](#) in the *Identifiers* section.
2. Enter the ORCID iD as the identifier, and set the identifier type to *ORCID iD*.