

FINAL REPORT: Integration of ORCID Research identifiers into the scholarly contributions of new researchers at Texas A&M.

Principal Investigator: Gail Clement, Associate Professor, Texas A&M University Libraries, [gclement@tamu.edu](mailto:gclement@tamu.edu).

## I. EXECUTIVE SUMMARY

Under the Sloan-funded ORCID Adoption & Integration Program, Texas A&M University Libraries proposed in September 2014 to develop, lead, and disseminate results of a demonstration project to integrate ORCID Identifiers into the scholarly contributions of our university's graduate students, post-doctoral researchers, and their interested faculty advisers. The five-fold objectives of this project were to:

1. Investigate methods of integrating ORCID Identifiers and profiles in three campus systems that represent institutional researcher contributions: the Vireo ETD management system; the University's OAK Trust Institutional Repository (DSpace platform); and the internally-used VIVO profile system.
2. Design, develop, and demonstrate successful integration of ORCID identifiers and profiles with the Vireo ETD Submission & Management system using test data from graduate students, post-doctoral fellows, and their interested faculty advisers.
3. Develop routines and workflows to associate ORCID iDs with the contributions of new researchers (particularly electronic theses and dissertations, but also journal articles, conference papers, and other works created by the target population) and to incorporate that metadata in the University Digital Repository and the ORCID registry
4. Devise, deliver, document, and assess methods of outreach and training to encourage graduate students and post-doctoral fellows to claim ORCID iDs and associate them with their works of scholarship.
5. Disseminate project results to international ETD and Repository communities, as well as users of the open source application Vireo, to catalyze broader integration of ORCID with works of new scholars.

These objectives were met in whole or in part during the project period, as detailed in the following sections.

## II. DELIVERABLES FOR EACH PROJECT OBJECTIVE

### **1. Objective: Investigate methods of integrating ORCID Identifiers and profiles in three campus systems that represent institutional researcher contributions: the Vireo ETD management system; the University’s Digital Repository; and the internally-used VIVO profile system.**

- a) Successful integration of ORCID iDs into the Vireo ETD system was completed in May 2014. Details are provided in the Use Case *Vireo ETD submission and management* available on the ORCID site at [http://orcid.org/sites/default/files/ETDs\\_Vireo\\_TAMU.pdf](http://orcid.org/sites/default/files/ETDs_Vireo_TAMU.pdf) and also included in Appendix A.
- b) Use ORCID iDs to link theses and dissertations in the Oak Trust Institutional Repository (IR) to the researcher profile in VIVO. Additionally, linkages were planned in VIVO between an ETD and the faculty advisors associated with their student’s work. Because of university administrative delays in certifying Spring 2015 graduation and publishing the Spring ETDs to the Institutional Repository, and a longer-than-expected timeline for VIVO implementation, the ORCID project team was unable to complete this component. Details of the planned integration are provided in the Use Case *VIVO* available on the ORCID site at [http://orcid.org/sites/default/files/VIVO%20Use%20Case\\_TAMU.pdf](http://orcid.org/sites/default/files/VIVO%20Use%20Case_TAMU.pdf) and also included in Appendix A.
- c) Texas A&M’s integration of ORCID iDs into the OAK Trust Institutional Repository relied on the outcome of the ORCID Adoption & Integration project funded by Sloan/ORCID to University of Missouri, for integration of ORCID identifiers into the DSpace open source institutional repository application (in collaboration with @mire) and the UM MOSpace institutional repository. To that end, the Texas A&M project team contracted with consultant Sarah Shreeves, University of Illinois and a Vireo adopter, to monitor the developments of UM and @mire. Ms. Shreeves organized a panel discussion about ORCID integration into DSpace at the Open Repositories Conference on June 10, 2014. The session *ORCID iDs in the Wild: Implementing ORCID iDs into Research Support and Repository Systems* examined: “how is the research community integrating ORCID identifiers into research support and repository systems? This panel will share their experiences in implementing ORCID identifiers into a variety of research support infrastructures, and discuss how institutions can best support broad adoption of ORCID in the research community.” ([https://www.conftool.com/or2014/index.php?page=browseSessions&form\\_session=51](https://www.conftool.com/or2014/index.php?page=browseSessions&form_session=51)). Based on this panel program, Ms. Shreeves advised the TAMU team that DSpace-ORCID integration would likely not be ready until version 5, thus rendering it unavailable for use before the end of the project period. Consequently, for the purposes of the ORCID A&I project, TAMU is discussing the creation of a local metadata field in DSpace for ORCID iDs associated with the ETD authors in its production IR (currently using DSpace 4). Future plans are to migrate the 2014 ORCID data to the appropriate field established in DSpace 5.
- d) Integration of ORCID iDs into the Campus Directory was achieved, in lieu of DSpace integration. Details of this integration are provided in the *LDAP/Directory Use Case* available on the ORCID site at [http://orcid.org/sites/default/files/LDAP%20Use%20Case\\_TAMU.pdf](http://orcid.org/sites/default/files/LDAP%20Use%20Case_TAMU.pdf) and also included in Appendix A.

**2. Objective: Design, develop, and demonstrate successful integration of ORCID identifiers and profiles with the Vireo ETD Submission & Management system using test data from graduate students, post-doctoral fellows, and their interested faculty advisers; and**

**3. Objective: Develop routines and workflows to associate ORCID iDs with the contributions of new researchers (particularly electronic theses and dissertations, but also journal articles, conference papers, and other works created by the target population) and to incorporate that metadata in the University Digital Repository and the ORCID registry**

- a) The functionality achieved under these two related objectives with respect to Electronic Theses and Dissertations was demonstrated at the ORCID Spring 2014 Outreach Meeting by Doug Hahn, Senior IT Manager, and James Creel, Senior Lead Software Applications Developer. Their slidesets are available on the ORCID web site at <http://www.slideshare.net/ORCIDSlides/hahn-orci-ds> and <http://www.slideshare.net/ORCIDSlides/creel-orcid2014>, respectively.
- b) The Main GitHub repository for VIREO is <https://github.com/TexasDigitalLibrary/Vireo>. The specific ORCID feature is available at <https://github.com/TexasDigitalLibrary/Vireo/pull/514>.
- c) The Link for Texa A&M's general PHP utilities that were used to MINT the ORCID's is: <https://github.com/TAMULib/ORCID-PHP-Tools>

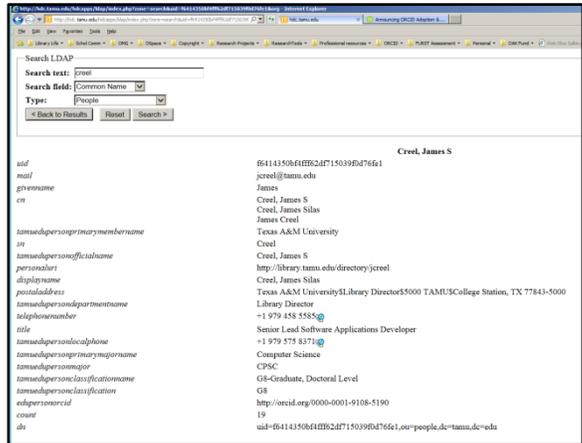
**4. Objective: Devise, deliver, document, and assess methods of outreach and training to encourage graduate students and post-doctoral fellows to claim ORCID iDs and associate them with their works of scholarship.**

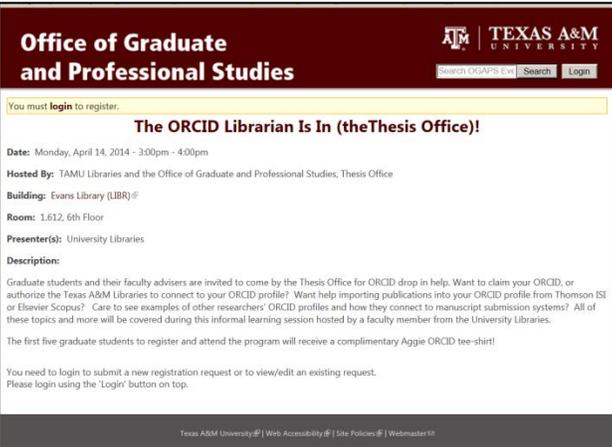
- a) An extensive outreach and training program complemented the ORCID-related IT development at TAMU, as detailed in the ORCID Use Case *Creating ORCID iDs* included in Appendix A.
- b) Additionally, the Project PI described the details of TAMU's ORCID outreach and instruction programs at the Spring 2014 ORCID Meeting, and also presented this information in the poster available on the ORCID website at <http://oaktrust.library.tamu.edu/handle/1969.1/151981> and in numerous other refereed presentations and publications referenced in Appendix B.

**5. Objective: Disseminate project results to international ETD and Repository communities, as well as users of the open source application Vireo, to catalyze broader integration of ORCID with works of new scholars.**

- a) Members of the Project Team contributed refereed presentations and papers to eleven professional or scholarly venues during the project period. These are referenced in Appendix B.
- b) At the suggestion of ORCID Director of Community, Dr. Rebecca Bryant, PI Clement and Vice Provost for Graduate and Professional Studies, Dr. Karen Butler-Purry, have submitted a program proposal for the 2015 Council of Southern Graduate Schools meeting
- c) The Principal Investigator also disseminated information about the project through phone discussions and e-mail correspondence with colleagues in other institutions; and via social media such as Twitter and the Free US ETDs blog at <http://sites.tdl.org/fuse>.

III. ASSESSMENT OF PROJECT SUCCESS: OUTPUTS

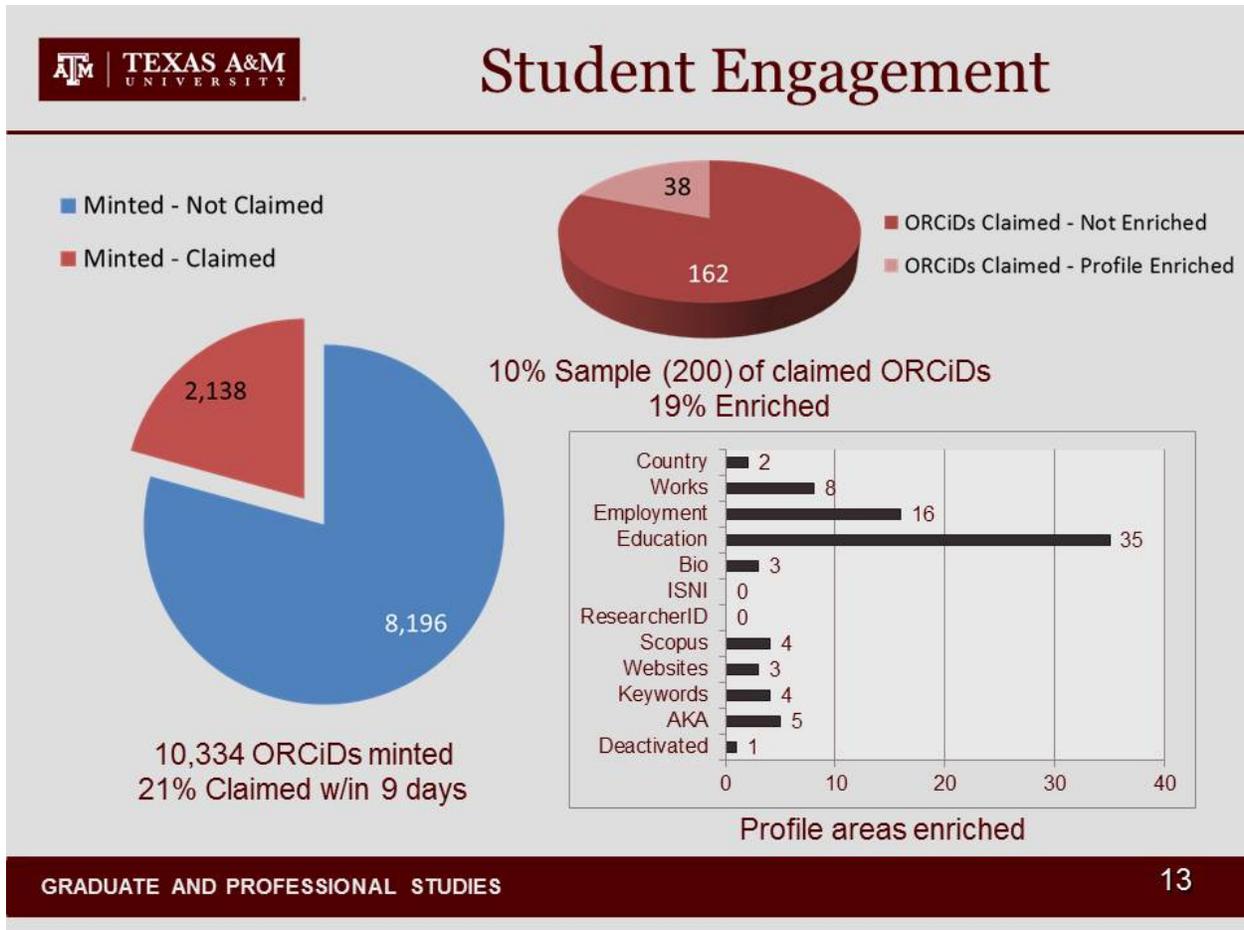
Output	Value	Notes
<b>ORCID minting</b>		
Number of ORCID's minted and stored in Library master file	10,393	10,334 ORCID's were minted for graduate students in February 2014 at the beginning of the project; the additional 59 iDs have been minted at the request of interested faculty, researchers, and graduate students after that date.
Number of minted ORCID's claimed in first 9 days	2138 (21%)	This number represents students who received and clicked through the email message from ORCID.org notifying them of their new iDs and providing a link to click through claim it and to change password.
Number of claimed ORCID profiles enriched with data by the graduate student	19%	See data presented at ETD2014 conference by Clement & Hammons, summarized in Impacts section below
Number of campus users asking to opt out of ORCID minting	2	1 faculty member; one graduate student expressed concerns about privacy
<b>ORCID integration</b>		
Number (and names) of campus systems including ORCID's as of 9-15-2014	3	<p>Library ORCID masterfile; Vireo ETD system; Campus Directory (LDAP). Example record for James Creel, member of Libraries' ORCID development team and a Texas A&amp;M graduate student, illustrates directory record with ORCID iD in the 'edupersonorcid' field.</p> <p>Plans to add ORCID's to the Oak Trust Institutional Repository (DSpace platform) and the VIVO researcher profile system are in process.</p> 
Number of ETDs associated with ORCID's captured from Spring semester 2014	~450 expected	Due to administrative delays in certifying graduation and then finalizing ETD data in Vireo, the Spring 2014 ETDs have not been published at the time of this writing.
Number of use cases submitted to ORCID for publishing on their A&I program website	4	<a href="http://orcid.org/organizations/institutions/usecases">http://orcid.org/organizations/institutions/usecases</a> . ETDs_Vireo_TAMU.pdf; LDAP Use Case_TAMU.pdf; VIVO Use Case_TAMU.pdf; Creating ORCID IDs for Graduate Students.pdf. The latter has been sent to ORCID but has not been posted on the ORCID website as of this writing. See Appendix A for the complete set of Texas A&M Use Cases.

<b>ORCID Outreach &amp; Instruction</b>		
Number of times ORCID LibGuide viewed	2424	<a href="http://guides.library.tamu.edu/researcher_ids">http://guides.library.tamu.edu/researcher_ids</a>
Number of downloads for the guide <i>Establishing Your Scholarly/Professional Identity with ORCID: A Care and Feeding Manual for Graduate Students</i>	709	The guide was deposited into the Texas A&M OAK Trust digital repository on Feb. 6, 2014; these statistics represent DSpace downloads after that date. Downloaded copies of the guide posted elsewhere are not reflected in these statistics.
Number of ORCID FAQs in the Library's AskUs database	26	<a href="http://askus.library.tamu.edu/">http://askus.library.tamu.edu/</a> (Search on keyword 'ORCID' to retrieve these FAQs)
Number of ORCID instruction sections provided	32	
Number of attendees in all instruction sections combined	~525	<b>Subject: today's CVM-GSA attendance Official signed in attendance was 53!</b>
Number of Library and OGAPS personnel providing ORCID instruction or point-of-use assistance	~26	ORCID A&I project team; ORCID outreach team; subject librarians; instruction librarians; AskUs public services staff; Thesis Office personnel
Number of printed ORCID information packets distributed	~420	
Number of ORCID-TAMU t-shirts distributed	~300	
<b>ORCID Project Dissemination</b>		
Number of presentations and papers about TAMU ORCID A&I project developed/delivered to professional audiences outside Texas A&M	11	See Appendix B, for complete citations to these works
Number of direct inquiries to PI about ORCID A&I project by colleagues from other institutions	>10	Examples: Boston Medical Center; Duke University; East Carolina University; NOAA; Rice University; Stony Brook University; Texas A&M Qatar Library; Texas Digital Library; University of Dublin (Ireland); University of Michigan

<p>Number of (known) tweets about TAMU ORCID project</p>	<p>48</p>	
<p>Number of (known) blog postings about TAMU ORCID project</p>	<p>6</p>	<p><i>Integration into Thesis and Dissertation Submission and Publication Processes</i>  <a href="https://orcid.org/blog/2014/03/20/theses-dissertations-orcid">https://orcid.org/blog/2014/03/20/theses-dissertations-orcid</a></p> <p><i>Message to Graduate Students: Establish Your Scholarly Identity At the Beginning of Your Career</i>  <a href="http://sites.tdl.org/fuse/?p=824">http://sites.tdl.org/fuse/?p=824</a></p> <p><i>ORCID's and ETDs: An innovative new program at Texas A&amp;M</i>  <a href="http://sites.tdl.org/fuse/?p=799">http://sites.tdl.org/fuse/?p=799</a></p> <p><i>Notes from NDLTD's conference on open access theses and dissertations</i>  <a href="http://lyhairian.com/2014/07/28/notes-from-ndltds-conference-on-open-access-theses-and-dissertations/">http://lyhairian.com/2014/07/28/notes-from-ndltds-conference-on-open-access-theses-and-dissertations/</a></p> <p><i>Empowering Graduate Student Research: Linking ORCID Identifiers to Theses and Dissertations</i>  <a href="http://www.proquest.com/blog/2014/Empowering-Graduate-Student-Research-Linking-ORCID-Identifiers-to-Theses-and-Dissertations.html">http://www.proquest.com/blog/2014/Empowering-Graduate-Student-Research-Linking-ORCID-Identifiers-to-Theses-and-Dissertations.html</a></p> <p><i>ORCID Outreach Meeting On May 21-22, 2014</i>  <a href="http://orcid.org/blog/2014/06/03/OutreachMeeting">http://orcid.org/blog/2014/06/03/OutreachMeeting</a></p>

IV. ASSESSMENT OF PROJECT SUCCESS: IMPACTS

Principal Investigator, Gail Clement, and Thesis Office Director, Dr. Laura Hammons, determined that an early indicator of project impact is engagement of students with their ORCID profiles. They performed an examination of 200 ORCID profiles belonging to graduate students who had claimed their minted ORCID in February 014. The resulting figure indicates that 19% added some data to their ORCID profiles after minting and claiming, most commonly in the form of educational status and degrees earned or in progress.



Clement, Gail and Hammons, Laura. 2014. Establishing Scholarly Identity by Graduate Students: Results of the ORCID-ETD Integration Project at Texas A&M University. ETD2014 Conference, Leicester, UK, July 23-25, 2014. <http://www2.le.ac.uk/library/etd2014/plenaries/orcid-etd-integration>

Where students included a link in their ORCID to their external websites, the link was followed to see whether the ORCID was posted on the external site. An example of this practice for one doctoral student in English is shown below.

**ATM | TEXAS A&M UNIVERSITY**

# Increasing Engagement

Kate Ozment | PhD Candidate, Texas A&M University

*Body, if not too violent, is I dare say conducive to health in its consequences — Run mad as often as you chide; but do not faint —*

words  
These were the last she ever addressed to me...

Home Education Conference Papers and Presentations Awards, Fellowships, and Memberships Teaching and Professional Experience Coursework Service and Projects Contact

### Who I Am

I am a doctoral student in the Department of English at Texas A&M University in College Station, Texas. My studies center on eighteenth century British literature with emphases on book history and critical childhood studies. In addition, I am pursuing a certificate in Women's and Gender Studies.

My professional interests and background lie in publishing, editing, copyediting, and copywriting in the fields of academia, news-editorial journalism, public relations, marketing, and creative writing.

OrCID: <http://orcid.org/0000-0001-7715-2539>

Archives

Categories

- Uncategorized

Meta

- Register
- Log in
- Entries RSS
- Comments RSS
- WordPress.com

Follow

**GRADUATE AND PROFESSIONAL STUDIES** **15**

With continued outreach, instruction, and minting of ORCID's for all new graduate students, as well as for interested faculty and researchers, the assessment of engagement with Texas A&M ORCID profiles will carry on.

## V. FINAL REPORT

Texas A&M University successfully requested a no-cost extension from ORCID until January 31, 2015. The approval for this extension is contained in Maestro Sponsored Project Summary - M1400380, attached as Appendix C.

## **APPENDIX A. USE CASES DEVELOPED BY TEXAS A&M**

*Vireo ETD submission and management*

[http://orcid.org/sites/default/files/ETDs\\_Vireo\\_TAMU.pdf](http://orcid.org/sites/default/files/ETDs_Vireo_TAMU.pdf)

*LDAP/Directory*

[http://orcid.org/sites/default/files/LDAP%20Use%20Case\\_TAMU.pdf](http://orcid.org/sites/default/files/LDAP%20Use%20Case_TAMU.pdf)

*VIVO*

[http://orcid.org/sites/default/files/VIVO%20Use%20Case\\_TAMU.pdf](http://orcid.org/sites/default/files/VIVO%20Use%20Case_TAMU.pdf)

*Creating ORCID iDs*

(submitted to ORCID on Sept. 8, 2014)



## ORCID Integration Use Case Documentation

### 1. Use case name

[Vireo ETD submission and management](#)

### 2. Institution name

*Texas A&M University Libraries*

### 3. Project goals and scope

*Integrate the ORCID into the submission process for electronic theses and dissertations. This is part of the broader project to provide ORCID's for all graduate students at Texas A&M University. The ORCID will be associated with the paper when it is published to the institutional repository.*

### 4. Is your organization willing to serve as a resource for other organizations pursuing ORCID integration?

*Yes*

### 5. Project personnel

*Please include name, title, phone number, and email address for each contact:*

*a. Project leader for grant, Gail Clement, Principle Investigator*

*b. Douglas C. Hahn, Sr IT Manager, dhahn@tamu.edu*

*c. Micah Cooper, Software Application Developer, jmicah@tamu.edu*

### 6. System(s) involved.

*The initial phase of the project (March 2013) utilized a batch process to mint ORCID's for all graduate students at Texas A&M University. This information will be stored in the campus LDAP server and will be available in the Shibboleth payload. Vireo, which utilizes Shibboleth for authentication, has been updated to receive the ORCID in the payload and to store it with the student information for the thesis or dissertation. The student will be given the opportunity to review their information and update it if needed. If an ORCID is not present, the student will be provided a link to claim the identifier. It is verified and stored with the student information maintained in Vireo. When the paper is published to the institutional repository, the ORCID will be part of the metadata included in the bundle.*

### 7. Project timeline

*The user interface for Vireo has been updated and is currently ready to deploy. The new release will go into production on or about May 1, 2014 immediately following the Vireo User Group meeting scheduled for April 30, 2014 in Austin, TX.*

**8. Project web page(s)**

*An agile development methodology is being used for this project with all cards and user stories saved on Digital Initiatives (DI) internal VersionONE site.*

**9. Please identify the stakeholder groups within this project and describe the outreach/communications work your organization arranged in advance of implementation. Which stakeholders did you contact? How did you organize a team? What were the policy impacts?**

*Communications with the various stakeholders was managed by the PI and is covered in the "Creation of ORCID IDs for Graduate Students" documentation.*

**10. Please provide an overview of your communications plan as well as examples of your communications outputs, which may be adapted by other organizations for their integrations.**

*DI will facilitate sending a series of email messages to the target audience, all at the guidance of the PI. This communications plan is covered in the "Creation of ORCID IDs for Graduate Students" documentation.*

**11. Are you willing to share your source code? If yes, please provide a link.**

*Upon completion of the project, DI will make all code, programs and scripts available via its GitHub page.*

**12. Please describe how the project will support ongoing maintenance and support.**

*The code supporting the ORCID in Vireo has been integrated into the base distribution and will be maintained as a part of the Vireo system. The new version will be available after the Vireo User Group meeting being held in Austin, TX on April 30, 2014. TDL will assume support for the new release at this time. See the website at <http://tdl.org/etds/>.*



## ORCID Integration Use Case Documentation

### 1. Use case name

*LDAP/Directory*

### 2. Institution name

*Texas A&M University Libraries*

### 3. Project goals and scope

*When minted, the ORCID will be added to campus LDAP directory. The identifier will be added to the campus tamuEduPerson schema and will be available to directory enabled applications via Shibboleth. Shibboleth is used extensively at Texas A&M University and adding the ORCID to LDAP facilitates use of the identifier in a number of directory enabled applications. For this project, the initial consumer of the ID will be the campus electronic thesis and dissertation system, Vireo. Vireo utilizes Shibboleth for authentication and the ORCID will be returned in the payload. The ORCID will then be mapped into the submission process and preserved when the work is published to the institutional repository.*

*For this project, the ORCID is a researcher identifier only and will not be used as an authentication or authorization credential.*

### 4. Is your organization willing to serve as a resource for other organizations pursuing ORCID integration?

*Yes*

### 5. Project personnel

*a. Project leader for grant, Gail Clement, Principle Investigator*

*b. Douglas C. Hahn, Sr. IT Manager, dhahn@tamu.edu*

*c. Micah Cooper, Software Application Developer, jmicah@tamu.edu*

### 6. System(s) involved.

*Initial process will be using PHP scripts to mint initial batch of ORCID. Minted ORCID's will be stored in a local database, along with authorization tokens. The local database of ORCID's will provide a data extract that is consumed by campus LDAP for population of the campus directory. This application supports the larger "Creation of ORCID IDs for Graduate Students" project. Please refer to that use case for additional information.*

### 7. Project timeline

*Minting of ORCID's will begin in March, 2014 with LDAP integration beginning as soon as TAMU Central IT extends the LDAP schema*

## 8. Project web page(s)

*An agile development methodology is being used for this project with all cards and user stories saved on DI's internal VersionONE site.*

## 9. Please identify the stakeholder groups within this project and describe the outreach/communications work your organization arranged in advance of implementation.

*TAMU Libraries Digital Initiatives (DI) has worked closely with campus IT in defining the scope of this project. Computing and Information Services (CIS) is the campus IT organization and manages and maintains LDAP as well as the Shibboleth authentication system. DI will handle creation and management of the ORCID while CIS will provide support for the new LDAP entries and the extended Shibboleth payload. CIS is also working with the MACE-DIR to explore options for adding the ORCID to the EduPerson schema. Outreach for this phase of the project lies with the PI.*

## 10. Please provide an overview of your communications plan as well as examples of your communications outputs, which may be adapted by other organizations for their integrations.

*The overall communications plan for ORCID IDs will include this phase of the project and no separate communications for LDAP is planned. DI will facilitate sending a series of email messages to the target audience, all at the guidance of the PI. This communications plan is covered in the "Creation of ORCID IDs for Graduate Students" documentation.*

## 11. Are you willing to share your source code? If yes, please provide a link.

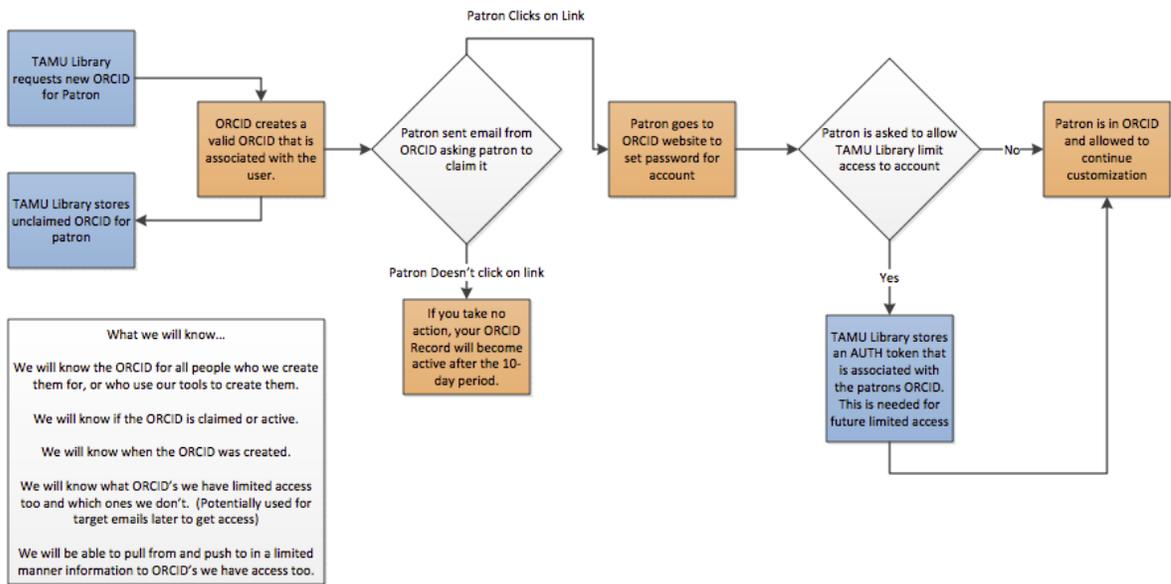
*Upon completion of the project, DI will make all code, programs and scripts available via its GitHub page.*

## 12. Please describe how the project will support ongoing maintenance and support.

*Initially, Vireo will be updated to include a link for requesting or claiming an ORCID. A separate application to support ORCID management on campus has been developed and will handle the interfaces to the directory. Once the ORCID is in LDAP, it will be managed just like any other attribute in the directory.*

### Supporting material and links.

- MACE-DIR working group site: <https://www.internet2.edu/communities-groups/middleware/mace-dir/>
- EduPerson Object Classes: <https://www.internet2.edu/products-services/trust-identity-middleware/eduperson-eduorg/>
- TAMU Directory Services: [http://infrastructure.tamu.edu/directory/enterprise.html#tab\\_tab1](http://infrastructure.tamu.edu/directory/enterprise.html#tab_tab1)





## ORCID Integration Use Case Documentation

### 1. Use case name

*VIVO*

### 2. Institution name

*Texas A&M University Libraries*

### 3. Project goals and scope

*Using the ORCID, this project will link theses and dissertations in the Institutional Repository (IR) to the researcher profile in VIVO. Additionally, linkages will be created in VIVO to link advisors to the item.*

### 4. Is your organization willing to serve as a resource for other organizations pursuing ORCID integration?

*Yes*

### 5. Project personnel

*Please include name, title, phone number, and email address for each contact:*

- a. Project leader for grant, Gail Clement, Principle Investigator*
- b. Douglas C. Hahn, Sr. IT Manager, dhahn@tamu.edu*
- c. Violeta Ilik, Semantic Technologies Librarian, vilik@library.tamu.edu*

### 6. System(s) involved.

*This project builds on the initial grant, "Creation of ORCID IDs for Graduate Students", by linking data from Vireo to the VIVO system. The ORCID will serve as a common researcher ID for linking the data.*

### 7. Project timeline

*This phase of the project goes into production once new theses and dissertations are being published to the IR. The Vireo updates will be moved into the production system following the Vireo User Group meeting on April 30, 2014. Once Vireo is in production and ETDs are being published to the IR and the library catalog, exporting data to VIVO can begin. We expect that happen mid-May, 2014.*

### 8. Project web page(s)

*As with all projects associated with this grant, an agile development methodology is being used for this project with all cards and user stories saved on Digital Initiatives (DI) internal VersionONE site.*

- 9. Please identify the stakeholder groups within this project and describe the outreach/communications work your organization arranged in advance of implementation. Which stakeholders did you contact? How did you organize a team? What were the policy impacts?**

*Communications with the various stakeholders was managed by the PI and is covered in the "Creation of ORCID IDs for Graduate Students" documentation.*

- 10. Please provide an overview of your communications plan as well as examples of your communications outputs, which may be adapted by other organizations for their integrations.**

*DI will facilitate sending a series of email messages to the target audience, all at the guidance of the PI. This communications plan is covered in the "Creation of ORCID IDs for Graduate Students" documentation.*

- 11. Are you willing to share your source code? If yes, please provide a link.**

*Upon completion of the project, DI will make all code, programs and scripts available via its GitHub page.*

- 12. Please describe how the project will support ongoing maintenance and support.**

*Vireo is support by the Texas Digital Library (TDL) team and is available for download. DI will continue to work with TDL to enhance and update the system. The web site for Vireo is <http://tdl.org/etds>. The Office of Scholarly Communications within the Texas A&M University Libraries maintains VIVO and will continue to manage data in that system.*



## ORCID Integration Use Case Documentation

1. **Use case name** Creation of ORCID iDs for graduate students.

2. **Institution name** Texas A&M University Libraries

3. **Project goals and scope**

A. Provide ORCID iDs for all ~10,000 graduate students at Texas A&M University with the aim of:

- Assisting early career authors establish their scholarly identities to ensure the greatest possible discovery, recognition and impact of their contributions
- Facilitate administrative tracking of graduate student outcomes over time
- Build capacity in the University Libraries, in partnership with other campus units, to enhance engagement in new modes and standards for scholarly communication at Texas A&M

B. Develop outreach materials for graduate students and other interested campus authors

C. Disseminate project outcomes to the ETD and repository communities.

4. **Is your organization willing to serve as a resource for other organizations pursuing ORCID integration?** Absolutely! With Pleasure.

5. **Project personnel**

*Please include name, title, phone number, and email address for each contact:*

- Gail Clement, Principal Investigator, Associate Professor. 979-862-1635. [gclement@tamu.edu](mailto:gclement@tamu.edu)
- Technical contact: Douglas C. Hahn, Sr. IT Manager; [dhahn@tamu.edu](mailto:dhahn@tamu.edu)
- Key personnel: Micah Cooper, Software Application Developer; [jmicah@tamu.edu](mailto:jmicah@tamu.edu)
- Key personnel: Violeta Ilik, Semantic Technologies Librarian; [vilik@tamu.edu](mailto:vilik@tamu.edu)
- Key personnel: Sandy Tucker, Head of Science and Engineering Services. (n/a; retired June 2014)

6. **System(s) involved.** Provide a workflow diagram showing where ORCID identifiers were collected and the system(s) modified to collect and/or store ORCID identifiers.

Please see the related TAMU use case "LDAP/Directory" at

[http://orcid.org/sites/default/files/LDAP%20Use%20Case\\_TAMU.pdf](http://orcid.org/sites/default/files/LDAP%20Use%20Case_TAMU.pdf)

## 7. Project timeline

- **Sept. 25, 2013: Notification of ORCID A&I grant award**
- **Sept. 25-October 30, 2013: Discussions with policy makers begin in earnest**
  - Libraries' IT department discussed integration of ORCID IDs into campus directory (LDAP)
  - PI discussed new Graduate School policy to require ORCID IDs for all graduate students in order to surmount FERPA obstacles preventing publishing of ETD data to ORCID and ORCID id's to Campus Directory.
  - November 12, 2013. Graduate School Policy established in support of minting ORCID IDs for all graduate students enrolled at Texas A&M. Policy also endorsed enhancement of Vireo ETD submission system with ORCID IDs so that ETD data could be published to graduate student ORCID profiles beginning with May 2014 graduation.
- **October 2, 2013: Launched Sharepoint team site on Libraries' intranet** to store project documentation and to facilitate information sharing amongst ORCID project team members.
- **November 2013: Outreach to key stakeholders began in earnest.**
  - Nov. 19, 2013: Delivered Presentation and Q&A session for Graduate Student Council (Student representatives from all Colleges and Schools)
  - Dec 2, 2013: Delivered Presentation and Q&A session for Graduate Operations Council (Graduate Deans from all Colleges and Schools)
  - Jan. 29, 2014: Libraries distributed Broadcast email message #1 developed and sent to all graduate students and faculty to let them know about ORCID project and where to learn more
  - Feb. 18, 2014: Libraries distributed Broadcast email message #2 developed and sent to all graduate students and faculty to let them know ORCID IDs being minted for them and what to do with message from ORCID.org
  - Mar. 19, 2014: Thesis Office sent broadcast e-mail message to Graduate Advisors listserv alerting them to availability of drop in ORCID help via *The ORCID Librarian Is In (the Thesis Office)!* (See Exhibit 4).
- **November 2013: Marketing/PR about ORCID project begins in earnest**
  - Libraries' Marketing Dept. issued press release to campus and local media outlets (see Exhibit 5a)
  - Nov.-Dec., 2013: Libraries Marketing Dept. designed and ordered SWAG (t-shirts, folders) to help promote ORCID project to campus stakeholders
  - Jan. 2014: Libraries Marketing Dept. worked with ORCID to set up Café Press Store for selling ORCID swag by ORCID
  - Feb. 13-14, 2014: Campus visit by ORCID's Rebecca Bryant. Meetings were set up with representatives from University IT, Office of Research, Dean of Faculties, and the Office of Graduate and Professional Studies. Rebecca presented talk at Libraries for all interested faculty and administrators *ORCID: Connecting Research and Researchers*
  - Apr. 10, 2014: Libraries sent press release to campus outlets about VIVO and ORCID initiative. (See Exhibit 5b).

- **November 1, 2013: Texas A&M ORCID membership finalized. Official ORCID-TAMU member logo devised for Marketing and PR use.**
- **November 2013: Outreach, training, and user support program begins in earnest**
  - As a result of marketing efforts, questions began coming in to various contact points (including the Dean of Libraries) regarding how to get an ORCID and when minting will begin.
  - Nov. 12, 2013: Delivered project overview presentation at Dean's Corner (monthly all-hands meeting) to raise awareness among Libraries' staff of ORCID project goals and scope
  - Jan. 7, 2014: Began planning for campus visit by ORCID's Rebecca Bryant.
  - Jan. 16, 2014: *ORCID LibGuide* published as primary landing page and starting point for ORCID information. See [http://guides.library.tamu.edu/researcher\\_ids](http://guides.library.tamu.edu/researcher_ids).
  - Jan. 16, 2014: Article about ORCID project published in February 2014 newsletter of Texas A&M Council of Principal Investigators. (See Exhibit 6)
  - Jan. 27, 2014: Set up dedicated email account for inquiries about ORCID via [orcid@library.tamu.edu](mailto:orcid@library.tamu.edu)
  - Jan. 27, 2014: Frequently asked questions and answers reformatted and added to Libraries' AskUs service at <http://askus.library.tamu.edu/>
  - February, 2014: Grad student guide *Establishing Your Scholarly/Professional Identity with ORCID: A Care and Feeding Manual for Graduate Students* developed, distributed, and posted to Digital Repository for downloading at <http://repository.tamu.edu/handle/1969.1/151483>
  - Feb. 5, 2014: *Graduate Student Workshop Series: Researcher and Author IDs-Distinguish Yourself with an ORCID* (1-hr. workshop held in Libraries)
  - Feb. 5, 2014: ORCID User Services team formed with membership from Libraries' Instruction and Reference Department and from the Medical Sciences Library.
  - Feb. 14, 2014: Invited ORCID workshop presented at the College of Veterinary Medicine Postdoctoral Association
  - Mar. 17, 2014: Invited ORCID workshop presented at the College of Veterinary Medicine Graduate Instruction Committee
  - April 2014: Initiated scheduled of "drop in ORCID help clinics" at the Thesis Office several times a week
  - April 18, 2014: Invited ORCID workshop presented at the College of Veterinary Medicine Graduate Student Association
  - Sept. 10, 2014: Invited ORCID workshop to new doctoral students in College of Education
- **November 2013: Efforts to share project plans and deliverables with scholarly community begins in earnest**
  - Nov. 12, 2013: Proposal developed and submitted for paper to be presented at North American Serials Interest Group (NASIG) May 2014 meeting on ORCID integrations, with Joseph Thomas from East Carolina University and Barbara Chen from Modern Language Association (<http://www.slideshare.net/NASIG/orcid-identifiers>)
  - Jan. 2014: Proposal developed and submitted for ORCID panel program at 2014 Texas Conference on Digital Libraries (TCDL), *It Takes a Village to Grow ORCID*s

*on Campus: Establishing and Integrating Unique Scholar Identifiers at Texas A&M*, with presentations from all members of Texas A&M Project Team (<https://conferences.tdl.org/tcdl/index.php/TCDL/TCDL2014/paper/view/730>)

- Feb. –Mar., 2014: Four presentations and one poster developed and submitted for ORCID Outreach Meeting, May 21, 2014 (Butler-Purry; Clement; Hahn; Cooper; <http://orcid.org/content/orcid-outreach-meeting-and-codefest-may-2014>)
- Feb. 12, 2014: Presentation developed and submitted for Open Repositories 2014 conference, *Theses and Dissertations and ORCID: A report from Texas A&M (via Illinois)* (Shreeves; <https://ideals.illinois.edu/handle/2142/49964> )
- Apr. 23, 2014: Serve as panelist on ORCID Webinar *Identification and Tracking of Early Career Researchers: How Universities and Funding Organizations are Using ORCID*. Recording available at <https://orcid.org/content/identification-early-career-researchers-how-universities-and-funding-organizations-are-using>
- July 23, 2014: Presented *Establishing Scholarly Identity by Graduate Students: Results of the ORCID-ETD Integration Project at Texas A&M University*. (Clement and Hammons, <http://www2.le.ac.uk/library/etd2014/plenaries/orcid-etd-integration>.)
- Aug. 7, 2014: Submitted proposal for ORCID Integration session at 2015 Conference of Southern Graduate Schools (Butler-Purry & Clement)

**8. Project web page(s)** [http://guides.library.tamu.edu/researcher\\_ids](http://guides.library.tamu.edu/researcher_ids)

**9. Please identify the stakeholder groups within this project and describe the outreach/communications work your organization arranged in advance of implementation. Which stakeholders did you contact? How did you organize a team? What were the policy impacts?**

- Key stakeholders included University Libraries; Office of Graduate and Professional Studies; University Thesis Office; Texas A&M Information Technology Office; Office of the Provost; Graduate Student Association; Graduate Operations Council; Council of Principal Investigators; Graduate Student organizations and Graduate Student Advisers within individual colleges and schools
- Key policy impacts were the requirement for ORCID iDs for all graduate students and the inclusion of ORCID iDs in the campus directory (using the field “edupersonorcid”)

**10. Please provide an overview of your communications plan as well as examples of your communications outputs, which may be adapted by other organizations for their integrations.**

- These have been identified in Section 7 and in the Exhibits.

**11. Are you willing to share your source code? If yes, please provide a link.**

- Yes. Please see related Use Cases at <http://orcid.org/organizations/institutions/usecases>



**Texas A&M University, *Creation of ORCID iDs for Graduate Students Use Case***  
**Exhibit #1.**

From: orcid@library.tamu.edu [mailto:orcid@library.tamu.edu]  
To: <name@tamu.edu>  
Subject: Coming Soon! ORCID Scholar Identifiers

Howdy,

This is to let you know that Texas A&M University Libraries is working with ORCID.org to establish unique scholar identifiers for graduate students, post-doctoral fellows, and faculty on our campus. The Open Researcher and Contributor ID (ORCID) is a new global standard being used by publishers, societies, universities, and funding agencies to link accurately a given author to his or her works.

This semester you will be receiving an ORCID, a unique 16-digit identifier that will be added to your Campus Directory record. If you are a graduate student submitting your electronic thesis or dissertation (ETD) this semester, you will also see your ORCID in Vireo, the online ETD submission and management system used at the University.

There are campus resources available to help you become familiar with ORCID identifiers and how to manage your scholarly identity at ORCID.org:

ORCID workshops, part of the Graduate Student Workshop Series: Researcher and Author IDs - Distinguish Yourself with an ORCID, Wednesday, February 5, 2014 - 11:00am - 12:00pm and Wednesday, February 12, 2014 - 5:30pm - 6:30pm.

An Online Guide and FAQ, Researcher Identifiers,  
[http://guides.library.tamu.edu/researcher\\_ids](http://guides.library.tamu.edu/researcher_ids).

Individual or group consultations, available by appointment. Email Associate Professor Gail Clement in the Office of Scholarly Communication.

Stay tuned for additional information about the ORCID integration program at the University Libraries.

Best regards,

Gail P. Clement  
Scholarly Communication Librarian  
& Associate Professor  
gclement@tamu.edu

Sandy Tucker  
Director of Science and Engineering Services  
& Associate Professor  
s-tucker@tamu.edu  
University Libraries

**Texas A&M University, *Creation of ORCID iDs for Graduate Students Use Case***  
**Exhibit #2.**

From: orcid@library.tamu.edu [mailto:orcid@library.tamu.edu]  
To: <name@tamu.edu>  
Subject: Your New ORCID Scholar Identifier

Howdy and Congratulations!

You now have a unique scholar identifier known as ORCID (Open Researcher and Contributor ID, pronounced orchid). ORCID is a new global standard being used by publishers, societies, universities, and funding agencies to reliably link a given author to his or her professional works and activities. The University Libraries and the Office of Graduate and Professional Studies are now relying on ORCID numbers to distinguish university authors, including graduate students, in our various information systems.

Your ORCID number is xxxx-xxxx-xxxx-xxxx. To claim this number and start managing and building your scholarly identity, please follow three easy steps:

1. Change your password after clicking on the link below.
2. Respond 'Yes, go to Authorize' when the screen asks you to allow Texas A&M University Libraries to read your ORCID record.
3. Click 'Authorize'.

Have questions about ORCID? Please check out the following support resources:

- o Downloadable Guide: Establishing Your Scholarly/Professional Identity with ORCID: A Care and Feeding Manual for Graduate Students
- o Online Guide and FAQ: ORCID and Other Researcher Identifiers  
Answers to Questions:
- o Send e-mail to the Libraries ORCID Team at: orcid@library.tamu.edu

Best regards,

Gail P. Clement

Scholarly Communication Librarian & Associate Professor  
gclement@tamu.edu

Sandy Tucker  
Director of Science and Engineering Services & Associate Professor  
s-tucker@tamu.edu

University Libraries  
Texas A&M University

**Texas A&M University, *Creation of ORCID iDs for Graduate Students Use Case***  
**Exhibit #3.**

From: <[support@orcid.org](mailto:support@orcid.org)>  
Date: Mar 6, 2014 9:46 PM  
Subject: [ORCID] Claim your newly-created ORCID Account  
To: <[name@tamu.edu](mailto:name@tamu.edu)>

Dear <Name> ,

TAMU Libraries created an ORCID Account for you. This account provides you with a unique research identifier (an ORCID id) that you can use in your publications and grants, and a place (an ORCID Record) to list information about your professional research activities.

WHAT DO YOU NEED TO DO?

Within the next 10 days, please review the information that TAMU Libraries entered as a courtesy on your behalf. Once you have logged in the first time, your account will become active, and you will have complete control over the privacy of your record and the information it contains. To review your record, set a password and make changes, click your unique link below, or copy and paste it into your browser:

<https://orcid.org/claim/a0RSL2ZuQko5bENnS1ppb1FxZXdKdz09?lang=en>

WHAT HAPPENS IF YOU DO NOTHING?

If you take no action, your ORCID Record will become active after the 10-day period.

When your Record becomes active, any information TAMU Libraries may have marked as "viewable by everyone" (public) will be viewable in the ORCID Registry and freely available to the public.

WHAT IS ORCID?

Launched in October 2012, the ORCID Registry contains unique identifiers (ORCID iDs) for researchers and scholars. In addition, the Registry enables you to designate "Trusted Organizations" with which you can exchange information. Many publishers and granting agencies have started to ask for ORCID iDs with submissions to better link researchers with their research activities. ORCID id holders control what is in their Records and who can see this information. Learn more about ORCID at <https://orcid.org/home?lang=en>.

Read ORCID's Privacy Policy at <https://orcid.org/home?lang=en/privacy-policy>. Have questions? Get help by emailing [support@orcid.org](mailto:support@orcid.org) or visiting <http://support.orcid.org>.

Kind Regards,  
The ORCID Team  
[support@orcid.org](mailto:support@orcid.org)  
<https://orcid.org>

## **Texas A&M University, *Creation of ORCID iDs for Graduate Students Use Case***

### **Exhibit #4.**

To: GRADADVISORS@LISTSERV.TAMU.EDU

Subject: Thesis Office Announces "The...Librarian Is In" Drop-In Hours for ORCID and Copyright Questions

Graduate advisors, please distribute the below message to faculty and students in your department. Thank you.

The Thesis Office and University Libraries are partnering together to offer Spring 2014 drop in services for ORCID and, separately, for copyright questions. Graduate students and their faculty advisers are invited to come by the Thesis Office to visit with University Libraries representatives on the dates and times noted below, depending on which service you seek. All sessions will be held in the Thesis Office, Room 612, Sterling C. Evans Library.

RSVPs are encouraged but not required. The first five graduate students to register and attend the program will receive a complimentary Aggie ORCID tee-shirt or "Aggies for Open Access" mug!

Register online at <https://academicevents.tamu.edu/ogaps>

The ORCID Librarian Is In (the Thesis Office)!

Want to claim your ORCID, or authorize the Texas A&M Libraries to connect to your ORCID profile? Want help importing publications into your ORCID profile from Thomson ISI or Elsevier Scopus? Care to see examples of other researchers' ORCID profiles and how they connect to manuscript submission systems? All of these topics and more will be covered during this informal learning session hosted by a faculty member from the University Libraries.

- Fri March 28, 3-5
- Wed April 2, 11-12
- Fri April 4, 3-4
- Fri April 11, 1-2
- Mon April 14, 3-4
- Thu April 17, 4-5
- Tues April 22, 3-4
- Fri April 25, 1-2

For questions, contact the Thesis Office at [thesis@tamu.edu](mailto:thesis@tamu.edu)

Regards,

Office of Graduate and Professional Studies | Texas A&M University

## **Texas A&M University, *Creation of ORCID iDs for Graduate Students Use Case***

### **Exhibit #5a.**

*Libraries to Partner in ORCID Adoption and Integration Program*

The ORCID (Open Researcher and Contributor ID) Organization recently selected the Libraries among nine institutions to partner in the ORCID Adoption and Integration Program. The funding will support the Libraries' project to generate unique, individualized identifiers for graduate students. The ORCID identifier will follow researchers over the course of their careers enabling them to distinguish their work research activities from other researchers with similar names. To learn more click [here](#).

### **Exhibit #5b.**

*University Libraries Adopts VIVO Application for Faculty Collaboration*

Marketing and Communications | April 10, 2014

The Texas A&M University Libraries is preparing to launch VIVO, a web-based community of research profiles to enhance faculty collaboration. By providing standard research profiles for all university faculty and graduate students, researchers can discover and contact individuals with similar interests whether they are across campus or at another VIVO institution. The data entry and standardization will continue through the summer with the VIVO debut planned for Open Access Week in October 2014.

"We want to make it easy for researchers to be identified on the Web," said Violeta Ilik, the Semantic Technologies Librarian responsible for implementing VIVO on campus. "The goal of VIVO is to make it easy for researchers on our own campus to find collaborators for interdisciplinary connections, projects and grants, something that is highly encouraged here [at Texas A&M]."

The VIVO implementation complements the Libraries' introduction of ORCID this spring. ORCID, a registry of unique identifiers for researchers, is part of the growing suite of services offered by the Libraries to develop research opportunities and scholar recognition through focused applications and software. The Libraries will also use VIVO to strengthen its understanding of expertise on campus to support the development of collections and services that support researchers' needs.

"This is the direction libraries are going in the future," Ilik said. "The semantic web technologies will make it much easier for us to find information. Semantic technology allows not only humans to read data available on the Internet, but also allows the machines to understand the data."

####

For more information about VIVO, please contact Violeta Ilik: 979-862-4661, or [vivo@library.tamu.edu](mailto:vivo@library.tamu.edu)

**Texas A&M University, *Creation of ORCID iDs for Graduate Students Use Case***  
**Exhibit #6.**

**CPI Newsletter – February 2014**

**[http://cpi.tamu.edu/archives/2.14\\_news/#orcids](http://cpi.tamu.edu/archives/2.14_news/#orcids)**

Open Researcher and Contributor IDs (ORCID*s*)

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You may have heard through your professional association or publisher of ORCID*s* (pronounced orchids), Open Researcher and Contributor IDs. ORCID*s* are persistent digital identifiers that distinguish a researcher from every other researcher with the same or a similar name. Additionally, ORCID*s* support automated linkages between an author and her/his research outputs and professional activities through integration in key research workflows such as manuscript and grant submission.

Texas A&M scholars will soon receive ORCID*s*, thanks to an Adoption and Integration grant awarded to the University Libraries by ORCID and funded by the Sloan Foundation, one of 9 grants awarded nationally. Texas A&M's program involves assigning ORCID*s* first to new scholars, that is, current graduate students and post-doctoral researchers, allowing them to create a scholarly identity at the beginning of their careers. Libraries programmers will add a field for ORCID*s* to the Vireo ETD submission and management system to link ORCID*s* with theses and dissertations. They will also integrate a field for ORCID*s* into the OAK Trust, the digital repository for campus scholarship.

After the first effort of assigning ORCID*s* to graduate students, the Libraries will mint ORCID*s* for faculty members and other researchers – sometime in the spring. If you would like to register for an ORCID sooner, visit the page [Register for an ORCID iD](#). For more information see the Libraries' guide, [Researcher Identifiers](#).

Contact:

Ms. Sandy Tucker – [s-tucker@tamu.edu](mailto:s-tucker@tamu.edu) or 862-1043

## APPENDIX B. Papers and Presentations on TAMU ORCID Adoption and Integration Project

Clement, Gail, 2014. “Establishing scholarly identities to improve campus publishing: Growing ORCID at Texas A&M” (poster presentation). *Library Publishing Forum*, March 5-6, 2014, Kansas City, MO. <http://www.librarypublishing.org/events/lpforum14>

Bryan, Rebecca, Clement, Gail, Sinche, Melanie, and Schaffer, Walter. 2014. *ORCID Webinar Workshop for Funders and Research Institutions*. April 23, 2014. <http://orcid.org/content/identification-early-career-researchers-how-universities-and-funding-organizations-are-using>

Clement, Gail, Ilik, Violeta, Hahn, Douglas, Cooper, Micah, Tucker, Sandra, 2014. “It Takes a Village to Grow ORCID on Campus: Establishing and Integrating Unique Scholar Identifiers at Texas A&M.” *Texas Conference on Digital Libraries*, Austin, TX, April 28-29, 2014. <https://conferences.tdl.org/tcdl/index.php/TCDL/TCDL2014/paper/view/730>

Chen, Barbara, Clement, Gail, and Thomas, William Joseph, 2014. “ORCID Identifiers: Planned and Potential Uses by Associations, Publishers, and Libraries.” Proceedings of the 29<sup>th</sup> North American Serials Interest Group Conference, Ft. Worth, TX, May 5, 2014. <http://www.slideshare.net/NASIG/orcid-identifiers>. Paper accepted for publication in *Serials Librarian*, Spring 2015.

Butler-Purry Karen, 2014. “Why ORCID @ Texas A&M University?,” *ORCID Outreach Meeting & Codefest*, Chicago, IL, May 21-22, 2014. <http://www.slideshare.net/ORCIDSlides/tamu-graduate-studies-may-2014-butlerpurry>

Hahn, Douglas, 2014. “Technical Implementation: Creating and Managing ORCIDs,” *ORCID Outreach Meeting & Codefest*, Chicago, IL, May 21-22, 2014. <http://www.slideshare.net/ORCIDSlides/hahn-orcid>

Clement, Gail, 2014. “ORCID-opoly, Where High-touch Meets High-Tech: Learning and Outreach efforts in support of ORCID Integration at Texas A&M,” (poster presentation), *ORCID Outreach Meeting & Codefest*, Chicago, IL, May 21-22, 2014. <http://oaktrust.library.tamu.edu/handle/1969.1/151981>

Creel, James, 2014. “Technical Implementation of ORCID Support for Texas A&M Scholars,” *ORCID Outreach Meeting & Codefest*, Chicago, IL, May 21-22, 2014. <http://www.slideshare.net/ORCIDSlides/creel-orcid2014>

Shreeves, Sarah L., Witt, Michael C., Luyten, Bram, and Andersson, Urban, 2014. “Theses and Dissertations and ORCID: A report from Texas A&M (via Illinois), presented at panel: ORCID in the Wild: Implementing ORCID into Research Support and Repository Systems.” *Open Repositories 2014*, Helsinki, Finland, June 9-13, 2014. <https://www.ideals.illinois.edu/handle/2142/49964>

Clement, Gail and Hammons, Laura, 2014. “Establishing Scholarly Identity by Graduate Students: Results of the ORCID-ETD Integration Project at Texas A&M University,” *ETD2014-17th International Symposium on Electronic Theses & Dissertations*, Leicester, UK, July 23-25, 2014. <http://www2.le.ac.uk/library/etd2014/plenaries/orcid-etd-integration>

Ilik, Violeta, 2014. Promoting ORCID Adoption in the Academic Institutional Ecosystem: Progress Reports from Adoption & Integration Partners,” *VIVO Conference*, Austin, TX, August 6-8, 2014.

# Establishing scholarly identities to improve campus publishing:

## Growing ORCID's at Texas A&M

Gail Clement, <http://orcid.org/0000-0001-5494-4806>

Office of Scholarly Communication, University Libraries, Texas A&M University, College Station, TX 77843 [gclement@tamu.edu](mailto:gclement@tamu.edu)

### The Name Ambiguity Problem in Publishing

Personal names are linked to several different roles in the publishing ecosystem in order to convey responsibility for a given work; to provide attribution where credit is due to the work's author(s), and also to expose relationships between authors and other research contributors (technician, advisor, editor, peer reviewer, grantee, etc.)

Yet personal names are inadequate forms of scholarly identity for use in publishing and research information systems: they can be identical or closely similar; they can be subject to variant translations, transliterations, and spellings; and they change due to personal events in one's life. This set of circumstances contributes to "The Name Ambiguity Problem" in publishing, as shown in the following slides from Rebecca Bryant, Director of Community at ORCID

Bryant, Rebecca, *Overview of ORCID for TAMU*, February 14, 2014. <http://www.slideshare.net/ORCID/slides/overview-of-orcidtamu02142014>



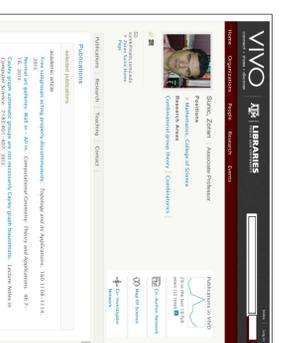
### ORCID ids @ TAMU

In 2014, Texas A&M University Libraries began integrating ORCID iD's for faculty, graduate students, and researchers into its information systems. This will equip our campus community to establish and curate their scholarly identities and also facilitate better management of research data by the University Libraries.

First priority are graduate students. ETD metadata will be published from the Vireo ETD management and publishing system into the new scholar's ORCID profile



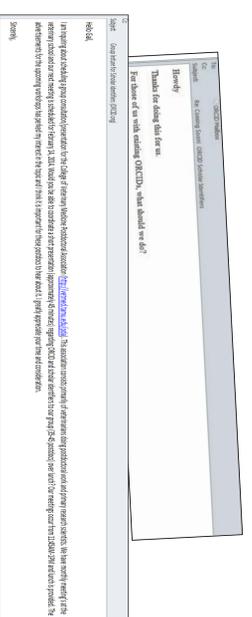
Next step is to integrate faculty, post-doc, and other researcher ORCID's into the VIVO profiles system.



### Initial Findings

It takes a village to grow ORCID's on campus

- **Libraries:** Marketing, IT, Learning & Outreach, Business Office, Schol Comm Office
- **Graduate School:** Visioning, Policy development, Marketing, Distribution, dispute resolution
- **Provost/Deans:** Policy approval and compliance
- **Individual champions:** promote ORCID in the disciplines
- **Stakeholder groups:** (e.g., Grad Student Council): Provide honest feedback, champion the program
- **ORCID is an easy sell -- Be prepared for instant uptake!**
- Synch ORCID iD minting with Outreach, or impatient users get their own ORCID's
- Grad Students report already being asked for ORCID's by publishers
- Faculty involved in societies and editorial boards also gaining familiarity with ORCID
- **Evidence we are approaching tipping point**
- EduPeople group looking at integrating in LDAP
- Research Information Systems like Academic Analytics showing interest in ORCID
- University Administration requesting ORCID's



### Learning & Outreach Efforts

- LibGuide
- E-mail reference
- Press releases
- Workshops
- Broadcast e-mails
- One-on-one meetings
- Drop-in hours at Thesis Office
- SWAG
- FAQs at public service desks
- "How-to" booklets
- Brief tutorials
- Presentations to key stakeholder groups
- Lead by example!



### Acknowledgements (WHOOPI)

Funding for this project comes from the ORCID/Sloan Foundation through the ORCID Adoption & Integration Program and from the Texas A&M University Libraries

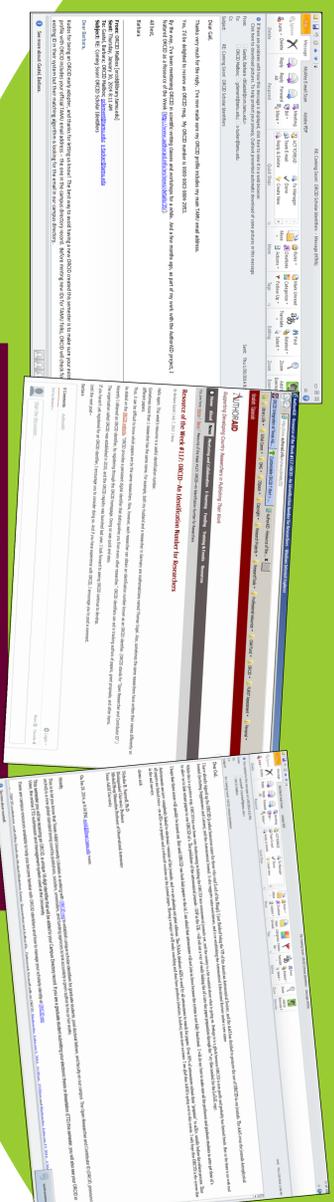
ORCID @ TAMU Team members include Gail Clement, Principal Investigator; Sandy Tucker, Micah Cooper, Violet Ililk, Key Personnel

Indispensable expert assistance contributed by: the Libraries' Marketing Team of Patrick Zinn, Chad Becker, and James Solano; Digital Initiatives developers Doug Hahn, James Creel, et al.; Associate Provost for Graduate Studies, Dr. Karen Butler-Purry; and Thesis Office Director, Dr. Laura Hammons.

**ORCID** Member Organization  
Connecting Research and Researchers

**LIBRARIES** TEXAS A&M UNIVERSITY

Faculty take us by surprise!  
Who knew we had early adopters?





( / )



(https://or

English



## ORCID Webinar Workshop for Funders and Research Institutions

THE ORCID REGISTRY  THE ORCID WEBSITE

Wednesday, 23 April 2014.

(/orcid-search/search)

**Video & slides are available below.**

Your use of the Registry and the results of your search are subject to ORCID's [Terms and Conditions of Use \(node/69\)](#)

Funding agencies, universities, and research institutes all face challenges of reliably identifying their researchers and monitoring outcomes over time. All researchers—and especially early career researchers seeking to establish their careers—need to be reliably connected to their research outputs, without the confusion common, changeable names creates. Graduate students and postdoctoral researchers supported by grants also have specific challenges: if they are not the PI, they are not included in grant information; they may not even know which grant(s) they are supported by; and as a result, the existing challenges of reliably tying publications to grant funding are even more problematic. The use of the unique, persistent ORCID identifier can help support outcomes tracking and evaluation (<http://orcid.org/blog/2014/02/19/supporting-evaluation-unique-and-persistent-identifiers-researchers>).

In 2012, the U.S. National Institutes of Health Biomedical Research Workforce Working Group (<http://biomedicalresearchworkforce.nih.gov/index.htm>) made recommendations that the NIH should take to support a sustainable biomedical research workforce in the U.S. In the course of its study, working group members were “frustrated and sometimes stymied” by the lack of quality, comprehensive data about biomedical researchers. In response, NIH has recommended the development of a simple, comprehensive tracking system for trainees, implemented a shared, voluntary researcher profile system called the Science Experts Network Curriculum Vitae (SciENCv) (<http://scienceofsciencepolicy.net/SciENCv>), and encouraged the adoption of unique, persistent ORCID identifiers (<http://biomedicalresearchworkforce.nih.gov/tracking-system.htm#d>) for researchers. Additionally, NIH has begun collecting data about individuals in graduate and undergraduate student project roles (<http://grants.nih.gov/grants/guide/notice-files/NOT-OD-13-097.html>) who are supported by NIH grants.

Research universities like Texas A&M (<http://guides.library.tamu.edu/content.php?pid=553864&sid=4564757>) are also responding by incorporating the ORCID identifier into their systems, enabling the improved identification, data collection, and career outcome tracking of students and postdoctoral researchers--and educating these early career researchers about the benefits they will receive from a unique, persistent research identifier. They are also beginning to link Electronic Theses and Dissertations (ETDs) (<http://orcid.org/blog/2014/03/20/theses-dissertations-orcid>) to early career researchers' ORCID records.

ORCID is an independent, non-profit organization that provides an open registry of unique and persistent identifiers for researchers and scholars. ORCID collaborates with the community to integrate ORCID identifiers into research systems and workflows, improving data management and accuracy across systems. ORCID enables interoperability between research systems worldwide, ensuring that researchers are correctly and automatically linked to their contributions. Since its launch in October 2012, ORCID has seen rapid adoption by more than 600,000 researchers and 130+ member organizations.



Want to learn even more about how universities and other research organizations are using ORCID? Join us in May at the upcoming ORCID Outreach Meeting (<https://orcid.org/content/orcid-outreach-meeting-and-codefest-may-2014>) in Chicago. Registration is free.

## Workshop agenda

- **Welcome, introductions, and brief introduction to ORCID slides** (<http://www.slideshare.net/ORCIDSlides/20140423-webinar-bryant>) / **video** (<https://vimeo.com/92888692>)

*Rebecca Bryant, ORCID*

- **The adoption of ORCID identifiers by funding organizations slides** (<http://www.slideshare.net/ORCIDSlides/20140423-webinar-schaffer>) / **video** (<https://vimeo.com/92781010>)

Funding agencies like the U.S. National Institutes of Health face challenges of reliability identifying their researchers and monitoring outcomes over time. In response to 2012 NIH Biomedical Research Workforce Working Group recommendations, NIH has recommended the development of a simple, comprehensive tracking system for trainees; implemented a shared, voluntary researcher profile system called the Science Experts Network Curriculum Vitae (SciENcv); and encouraged the adoption of unique, persistent ORCID identifiers for researchers. Additionally, NIH has begun collecting data about individuals in graduate and undergraduate student project roles who are supported by NIH grants. In this presentation, Dr. Shaffer shares how ORCID is being incorporated into SciENcv and will help with name disambiguation and improve data for NIH, and other federal agencies planning to adopt SciENcv.

*Walter Schaffer, NIH*

- **Challenges and benefits of using ORCID for early career researchers and research organizations slides** (<http://www.slideshare.net/ORCIDSlides/20140423-webinar-sinche>) / **video** (<https://vimeo.com/92871891>)

Universities and postdoctoral affairs offices also have challenges of collecting meaningful data about the outcomes of their students and trainees. Early career researchers also face the challenge of not having their work discovered and recognized because of name ambiguity problems: common, changed, or misspelled names. In this presentation, Melanie Sinche provides an overview of the local, national, and international challenges to collecting information about postdoctoral researchers, particularly related to career outcomes and funding. The use of ORCID identifiers within local and national data collection efforts can help facilitate more reliable information as well as information sharing.

*Melanie Sinche, Harvard University*

- **Establishing and curating scholarly identities with ORCID slides** (<http://www.slideshare.net/ORCIDSlides/20140423-clement>) / **video** (<https://vimeo.com/92861332>)

Research universities like Texas A&M are creating ORCID identifiers for all of their students and incorporating ORCID into their systems, enabling the improved identification, data collection, and career outcome tracking of their students. They are also responding by educating these early career

researchers about the benefits they will receive from a unique, persistent research identifier. In this presentation, Professor Clement describes TAMU's decision to adopt ORCID, how it addressed policy considerations, and how it has facilitated the creation of more than 10,000 ORCID identifiers for graduate students at this major U.S. research university. TAMU has been particularly proactive in its outreach efforts to educate graduate students and postdoctoral researchers about the importance of ORCID as part of their professional identity.

*Gail Clement, Texas A&M University*

## About our speakers

---

Rebecca Bryant, ORCID

 [orcid.org/0000-0002-2753-3881](http://orcid.org/0000-0002-2753-3881) (<http://orcid.org/0000-0002-2753-3881>)

Rebecca Bryant is Director of Community at ORCID where she leads outreach initiatives to encourage the adoption of ORCID identifiers throughout the scholarly communications community. In this role, she coordinates the diverse ORCID Ambassadors program, provides oversight for the Sloan-funded Adoption and Integration program, and develops resources and communications. Prior to joining ORCID she served as Assistant Dean in the Graduate College at the University of Illinois where she led a diverse set of operations, including graduate career services, postdoctoral affairs, and overseeing academic policies and processes related to doctoral degree completion. In addition, she has experience defining and launching new technology initiatives including Electronic Theses and Dissertations (ETDs) and serving as a project leader the system-wide Banner ERP implementation team at Illinois.



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Gail Clement, Texas A&M University

 [orcid.org/0000-0001-5494-4806](http://orcid.org/0000-0001-5494-4806) (<http://orcid.org/0000-0001-5494-4806>)

Gail Clement is an academic/research librarian with extensive experience in scientific and grey literature publishing, copyright education, and digital library development. She is currently an Associate Professor in the Office of Scholarly Communication (<http://scholarlycommunication.library.tamu.edu/>) at Texas A&M University Libraries where she leads the ORCID integration project and manages the Online Access to Knowledge (OAK) fund in support of OA publishing fees. In addition to her work in academic libraries, Gail has served as a research assistant and information manager in scientific research settings in the lab, field and onboard ship. Her pre-MLIS experience and skills in data management, scientific publishing, and curation of research collections are proving invaluable to current work in the scholarly communications, e-science, data management, and digital scholarship arenas.



---

Walter Schaffer, National Institutes of Health

 (<http://orcid.org/0000-0002-2753-3881>) [orcid.org/0000-0002-2276-4656](http://orcid.org/0000-0002-2276-4656) (<http://orcid.org/0000-0002-2276-4656>)

Walter Schaffer serves as Senior Scientific Advisor for Extramural Research at National Institutes of Health and has played a key role in the implementation of recommendations set forth by the Biomedical Research Workforce Working Group (<http://biomedicalresearchworkforce.nih.gov/index.htm>).



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Melanie Sinche, Harvard University

 (<http://orcid.org/0000-0003-3188-6273>) [orcid.org/0000-0001-5238-9642](http://orcid.org/0000-0001-5238-9642) (<http://orcid.org/0000-0001-5238-9642>)

Melanie Sinche currently serves as Director of the FAS Office of Postdoctoral Affairs (<http://www.postdoc.harvard.edu/>) in the Faculty of Arts and Sciences at Harvard University. In this role, she serves over 1,000 postdocs across a variety of disciplines, assisting with their career and professional development, and advises university administrators on issues pertaining to postdoctoral scholars. Melanie has also been working with the National Postdoctoral Association (<http://nationalpostdoc.org/>) to improve data collection on postdoctoral scholars across the U.S.



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It Takes a Village to Grow ORCID's on Campus: Establishing and Integrating Unique Scholar Identifiers at Texas A&M

*Gail Clement, Violeta Ilik, Douglas Hahn, Micah Cooper, Sandra Tucker*

Last modified: 2014-04-14

### Abstract

This panel presentation focuses on an innovative program at Texas A&M that is changing workflows and practices not only within the Libraries but also across campus. Led by a cross-unit team from the University Libraries, the ORCID Integration initiative at Texas A&M University aims to incorporate globally unique scholar identifiers into the research information systems and workflows used within and beyond the university. At the heart of the program is the establishment of Open Researcher and Contributor ID (ORCID) identifiers for every graduate student, faculty member, and full time researcher on campus, and the integration of those identifiers in key campus systems: the Vireo system for electronic thesis and dissertation (ETD) submission and management; the OAK Trust digital repository for capturing and preserving campus research outputs; and the VIVO researcher profile system for establishing and representing the scholarly identity of each campus author.

ORCID is a new global standard being used by publishers, societies, universities, and funding agencies to distinguish authors unambiguously and permanently, in order to accurately associate a given author with his or her research contributions. Thanks to advocacy and education efforts by the Libraries, Texas A&M University Administration has determined that ORCID identifiers are necessary as a business operation for distinguishing the research contributions of each campus author; managing and preserving the institution's research outputs; and ensuring that works created at and by the institution are easily discoverable and accessible in the rapidly expanding online information environment of the World Wide Web.

It has taken considerable input and efforts by library faculty and application developers, in consultation with university administration, the graduate studies office, and the campus IT department, to design, plan, and implement ORCID integration at the scale of a large research university. Information sharing policies have seen revision and expansion; existing applications have gained new features and functions; new applications have come online; marketing and outreach campaigns raise awareness of the benefits of establishing a unique scholar identity for campus stakeholders; and learning and user support programs are assisting users in claiming and seeding their ORCID profiles while also preserving preferences for privacy.

This panel presentation includes representatives from each of the units contributing to the success of the ORCID Integration Project at Texas A&M. Panelists will provide demonstrations of applications devised during the project and samples of learning and assessment materials used. An open mike segment at the end of the panel presentation will enable attendees to ask questions about specific aspects of the project.

### Keywords

ORCID; scholarly identity; scholarly communication

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## Why ORCID @ Texas A&M University?



**Dr. Karen Butler-Purry**  
Associate Provost for Graduate and Professional Studies  
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May 2014

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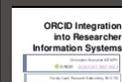
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**Gail Clement**  
Associate Professor, Office of Scholarly Communication  
Texas A&M University Libraries

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James Creel, Senior Lead Software Applications Developer  
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Author: [Clement, Gail](#)

Abstract: In February 2014, Texas A&M minted ORCIDiDs for 10,000+ graduate students as an ORCID member organization. In the first 9 days, about 2000 students claimed their ORCIDiDs, demonstrating that high tech alone is not sufficient to reach and engage campus authors to establish and curate their scholarly identities. Significant learning, outreach, marketing and other "high touch" approaches are needed to close the gap between immediate claiming of minted ORCIDiDs and authentic uptake and involvement with ORCID. This poster illustrates the varied approaches used by Learning and Outreach specialists and the impacts that "high touch" approaches can achieve.

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### Session Overview

#### Session

**P2B: Parallel session 2B**  
*Time:* Tuesday, 10/Jun/2014: 1:30pm - 2:45pm *Location:* Paasitorni - Siltasaari Hall  
*Session Chair:* Esa-Pekka Keskitalo 200 people  
 Panel

#### Session Abstract

The session has been recorded and [is available for watching](#).

#### Presentations

**ORCID<sup>s</sup> in the Wild: Implementing ORCID<sup>s</sup> into Research Support and Repository Systems**  
 Sarah L. Shreeves<sup>1</sup>, Michael C. Witt<sup>2</sup>, Bram Luyten<sup>3</sup>, Urban Andersson<sup>4</sup>  
<sup>1</sup>University of Illinois at Urbana-Champaign, United States of America; <sup>2</sup>Purdue University, United States of America; <sup>3</sup>mire; <sup>4</sup>Chalmers University, Sweden  
 ORCID<sup>s</sup> provide persistent digital identifiers to researchers to support disambiguation and links between different pieces of the research support infrastructure, among other things. Researchers can sign up for their own identifier at the ORCID website and add it to CVs, manuscript submission forms, etc., but how is the research community integrating ORCID identifiers into research support and repository systems? This panel will share their experiences in implementing ORCID identifiers into a variety of research support infrastructures, and discuss how institutions can best support broad adoption of ORCID in the research community.

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## ORCID ETD integration

Laura Hammons and Gail Clement on how Texas A&M University has allocated ORCID identifiers to all its current graduate students.

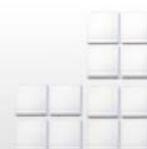
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7:30 am - 4:15 pm	Registration in <b>Texas Foyer</b>		
7:30 am - 8:30 am	Networking Breakfast in <b>Texas Foyer</b>		
8:30 am - 9:00 am	Opening/Welcome in <b>Zilker Ballroom 1-2</b>		
9:15 am - 10:15 am	VIVO Keynote Speaker: Peter Fox in <b>Zilker Ballroom 1-2</b>		
10:15 am - 10:30 am	Networking Break in <b>Texas Foyer</b>		
	<b>Texas I</b>	<b>Texas II</b>	<b>Texas III</b>
10:30 am - 11:00 am	Invited Speaker:  Elaine Collier	Integrating Symplectic Elements with VIVO 1.6 - Daniel Grant, Mary Walters, Michael Mitchell and Tim Morris - pg. 28	Using OAI-PMH Protocol for Data Ingest into VIVO Instances - Alexandre Rademaker and Violeta Ilik - pg. 25
11:00 am - 11:30 am		Is Presentation and Institutional Branding Really More Important than Linked Research Open Data? - Alex Viggio and Jonathan Breeze - pg. 32	Improving Accessibility and Cost-Effectiveness of Research Publications: The Role of Public Data - John Mark Ockerbloom and Manuel De La Cruz Gutierrez - pg. 30
11:30 am - 12:00 pm		VIVO Team Recommender Based on Linked Open Data Conforming to the VIVO Ontology - Noshir Contractor, Anup Sawant and Harshad Gado - pg. 31 - <b>Hosted by Elsevier</b>	The Stewardship Challenges of Long Term Open Scholarship: An Open Access Institutional Repository Perspective - Simone Sacchi and Amy Nurnberger - pg. 30
12:00 pm - 1:30 pm	Lunch (on own)		
	<b>Texas I</b>	<b>Texas II</b>	<b>Texas III</b>
1:30 pm - 2:00 pm	Implementing VIVO: A Selection of Real-Life Experiences - pg. 20	VIVO: Bringing Together Cancer Researchers in India and South Asia - Anil Srivastava, Hemant Darbari, R.A. Badwe and Purvish Parikh - pg. 22	Collaboration Institutionally and Beyond: Status, Partners, and Next Steps - William Barnett, David Eichmann, Griffin Weber, Eric Meeks, Amy Brand and Holly Falk-Krzesinski - pg. 20 <b>- Hosted by Digital Science</b>
2:00 pm - 2:30 pm		VIVO and Current Research Information Systems in Germany: Projects, Trends and Challenges - Lambert Heller, Gabriel Birke, Ina Blümel, Martin Mehlberg, Christian Hauschke and Robert Jäschke - pg. 23	
2:30 pm - 3:00 pm	Networking Break in <b>Texas Foyer</b>		
	<b>Texas I</b>	<b>Texas II</b>	<b>Texas III</b>
3:00 pm - 3:30 pm	VIVO Success Factors: Moving Towards a Sustainable Future for VIVO - Jonathan Markow and Layne Johnson - pg. 20	The Griffith Scholars Hub - VIVO Extensions - Arve Solland - pg. 21 <b>- Hosted by Symplectic</b>	Promoting ORCID Adoption in the Academic Institutional Ecosystem: Progress Reports from Adoption & Integration Partners - Katherine Chiang, Kristi Holmes, Violeta Ilik and Christopher Shanahan - pg. 20 <b>- Hosted by Symplectic</b>
3:30 pm - 4:00 pm		Building VIVO-Based Research Management Infrastructure for Higher Education: The IREMA Case - Anastasios Tsolakidis, Cleo Sgouropoulou, Evangelia Triperina and Panos Kakoulidis - pg. 24	
4:00 pm - 4:30 pm	Network Imputation in Predicting Researcher Collaboration - Yun Huang, Chuang Zhang, Maryam Fazel-Zarandi, Hugh Devlin, Alina Lungeanu, Stanley Wasserman and Noshir Contractor - pg. 33	Adapting and Using VIVO to Improve Food Security and Innovation in Agriculture - Federico Sancho & Manuel Hidalgo - pg. 34	Linked Data for Libraries - Dean Krafft and Jon Corson-Rikert - pg. 34
5:00 pm - 7:00 pm	Poster Session & Networking Reception in <b>Zilker Ballroom 3-4</b>		

# CONFERENCE ABSTRACTS

## PANELS

pg. 20 **Collaboration Institutionally and Beyond: Status, Partners, and Next Steps**

**PRESENTERS:** William Barnett, David Eichmann, Griffin Weber, Eric Meeks, Amy Brand and Holly Falk-Krzesinski

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pg. 20 **Promoting ORCID Adoption in the Academic Institutional Ecosystem: Progress Reports from Adoption & Integration Partners**

**PRESENTERS:** Katherine Chiang, Kristi Holmes, Violeta Ilik and Christopher Shanahan

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pg. 20 **Implementing VIVO: A Selection of Real-Life Experiences**

**PRESENTERS:** Panelists to be named

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pg. 20 **VIVO Success Factors: Moving Towards a Sustainable Future for VIVO**

**PRESENTERS:** Jonathan Markow and Layne Johnson

## PRESENTATIONS

pg. 21 **The Griffith Scholars Hub - VIVO Extensions**

**PRESENTER:** Arve Solland

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pg. 22 **VIVO: Bringing Together Cancer Researchers in India and South Asia**

**PRESENTERS:** Anil Srivastava, Hemant Darbari, R.A. Badwe and Purvish Parikh

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pg. 22 **Enriching Researcher Profiles with Altmetric Data**

**PRESENTERS:** Evan Adie and Catherine Chimes

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pg. 23 **New Tools for VIVO Developers**

**PRESENTER:** Jim Blake

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pg. 23 **VIVO and Current Research Information Systems in Germany: Projects, Trends and Challenges**

**PRESENTERS:** Lambert Heller, Gabriel Birke, Ina Blümel, Martin Mehlberg, Christian Hauschke and Robert Jäschke

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pg. 24 **Building VIVO-Based Research Management Infrastructure for Higher Education: The IREMA Case**

**PRESENTERS:** Anastasios Tsolakidis, Cleo Sgouropoulou, Evangelia Triperina and Panos Kakoulidis

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pg. 24 **Situating VIVO within a Research Analytics Architecture**

**PRESENTER:** Simon Porter

## COLLABORATION INSTITUTIONALLY AND BEYOND: STATUS, PARTNERS, AND NEXT STEPS

William Barnett, David Eichmann, Griffin Weber, Eric Meeks, Amy Brand and Holly Falk-Krzesinski

### Abstract

A key component of success to VIVO and other research networking platforms is their successful use by and utility for science communities. Such success necessarily involves stakeholders representing investigators, institutions, service and software providers, and industry partners. This panel will explore progress and plans to advance the use of research networking by researchers, explore project dynamics around a public private partnership between academic institutions and industry, and discuss how these activities can advance the mission of translational science (or science in general) to the benefit of all. This panel will focus on the following:

- The adoption of research networking by translational sciences communities to date
- The intellectual merits of a FutureResearchNet project in terms of improving our understanding of how researchers would discover collaborators
- How this effort will help better understand and serve the successful formation of science teams
- How it represents a collaboration between academia and industry

Panelists represent national efforts to advance collaboration, institutions that have assessed the success of these efforts to date, and plans for the future.

## PROMOTING ORCID ADOPTION IN THE ACADEMIC INSTITUTIONAL ECOSYSTEM: PROGRESS REPORTS FROM ADOPTION & INTEGRATION PARTNERS

Katherine Chiang, Kristi Holmes, Violeta Ilik and Christopher Shanahan

### Abstract

With funding from the Alfred P. Sloan Foundation, the ORCID Adoption and Integration Program has provided external funding for universities and science and social science professional associations to integrate ORCID identifiers and support the collaborative elicitation and documentation of use cases in the scholarly domain. As awardees, Boston University, Cornell University, and Texas A&M University have engaged in complementary integration projects addressing different key elements of the academic research networking ecosystem -- faculty members, college-level administrators, and graduate students through the thesis and dissertation process.

ORCID provides a path forward at a global scale for addressing disambiguation issues that have significantly reduced opportunities for networking researchers across projects, departments, and

institutions. ORCID is an important part of any researcher's professional identity, and it is especially important for early career researchers to claim and use their ORCID iD to help ensure they get credit for all of their work. ORCID iDs can also benefit graduate schools, and postdoctoral affairs offices seeking better information about career outcomes.

Panelists will present their institutional experience(s) with ORCID integration and adoption ranging from proactive creation of ORCID iDs for all graduate students and/or faculty members to low-key, distributed engagement at the individual college and department level to raise awareness across a heterogeneous research university. Each panelist will also describe the role of a research networking system (Profiles or VIVO) with respect to ORCID adoption at their institution.

## IMPLEMENTING VIVO: A SELECTION OF REAL-LIFE EXPERIENCES

Panelists to be named

### Abstract

Implementation of VIVO at an institution raises a number of challenges: technical, social, and policy. In this panel, representatives of five different institutions with a wide range of organizational structures, mandates, and technical environments will each present the particular challenges they faced in implementing VIVO at their institutions, and the approaches that they took to address these challenges. For anyone considering a VIVO implementation, this will be an opportunity to learn about the resources you will need, the gatekeepers that you will confront, and the messaging that you should, or should not, use to reach out to faculty and administrators at your institution. During the first part of the session, each institutional representative will present some key lessons from their own implementation. During the second part of the session, there will be an opportunity for questions from the audience on their biggest concerns as they contemplate their own VIVO implementations. This will be a great opportunity to minimize the bumps in the road as you consider implementing VIVO, or indeed any institutional researcher profiling system.

## VIVO SUCCESS FACTORS: MOVING TOWARDS A SUSTAINABLE FUTURE FOR VIVO

Jonathan Markow and Layne Johnson

### Abstract

As part of the DuraSpace organization, the VIVO project has a specific set of goals that it needs to meet to move from being an incubator project to a full, permanent part of the DuraSpace portfolio. Some of those goals are internal to DuraSpace and the current core VIVO team, but many of them involve the participation of the full VIVO community. In this talk, Jonathan Markow, the Chief Strategy Officer for DuraSpace, and Layne Johnson, the VIVO Project Director, will present a roadmap toward achieving long-term sustainability for the VIVO project under the DuraSpace umbrella. Come to hear about the progress that has already been made, as well as the next steps as we work to ensure that VIVO continues to meet the needs of the ever-expanding VIVO community.

**APPENDIX C. MAESTRO Sponsored Project Summary - M1400380 extension to Award #RFP2013-06-A07 until January 31, 2015.**