

Archive of the Adaptation blog (for the JISC/ARMA ORCID pilot at the University of Southampton)

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Blogging about Southampton's ORCID pilot

Posted on [May 16, 2014](#) by [Isobel Stark](#)

This blog will report on the progress of the [ORCID](#) pilot at the University of Southampton funded by [JISC](#) and supported by [ARMA](#) (the UK's professional association for research managers and administrators).

We will make regular postings giving details of what we are doing and planning to do, as well as links to related sites and publications.

This entry was posted in [welcome](#) and tagged [about us](#), [welcome](#).

<http://blog.soton.ac.uk/orcid/2014/05/16/hello-world/>

Summary Report

Posted on [March 31, 2015](#) by [Michael Whitton](#)

This blog is an important part of our reporting to Jisc for this project. To recognise this, an [archive of this blog](#) has been deposited with our Institutional Repository ePrints Soton.



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The other significant element is the [Summary Report](#), also publically available through ePrints Soton.

Benefits of the Southampton Approach

Posted on [January 26, 2015](#) by [Michael Whitton](#)

An equally important area of reflection is the benefits coming from our approach and the project.

Having the Jisc project at Southampton did improve both knowledge and skills of ORCID within the organisation. One example is the Library was better able respond to enquiries and embed advice in academic practice – for example resulting out of the [NIHR](#) asking for ORCID IDs for a grant application.

Also the Jisc project has increased the awareness of ORCID within key parts of the institution, such as the library, IT, Research and Innovation Services and the senior management within the university (e.g. the Pro Vice-Chancellor Research). Endorsement and support from key national and international bodies has demonstrated that ORCID is a significant development.

We are more able to raise awareness with researchers and explain the benefits than before. An effective way is to integrate this into wider conversations and activities relating to research support (e.g. this is now covered as part of our open access training and desktide training). We expect immediate personal benefits to academics to be further increased by the integration of our new CRIS.

Also it has helped us understand some of the requirements for procurement of our new CRIS. Given developments by the major suppliers (Elsevier and Thomson Reuters) we expect ORCID to reduce the burden on academics and administrators in maintaining publications on our repository. E.g. alerting of publications missing from the repository and more automated author disambiguation. Also since ORCID is included in [RIOXX](#), there is the potential to help with interoperability with [ResearchFish](#) and HEFCE REF systems.

One significant area for integration will be the [Equipment.Data](#) service. After careful consideration the best way to do this will be to link outputs (publications and data) to the equipment they use. (There are also significant potential benefits of linking equipment to grant applications – something RCUK is considering.) After scoping options, we would like to develop something for widespread use and are modelling a

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plugin for the [EPrints Bazaar Store](#), which could be promoted via the EPrints user community.

We have already added our repositories OAI PMH details to our [Organisation Profile Document \(ODP\)](#). We envision this as a route to discover repositories with appropriate data.

This entry was posted in [academics](#), [technical](#).

<http://blog.soton.ac.uk/orcid/2015/01/26/benefits-of-the-southampton-approach/>

Getting the message out

Posted on [January 23, 2015](#) by [Isobel Stark](#)

As the official project draws to an end, we are still very busy promoting the new service to researchers at the University of Southampton. Getting the message out there is something we're going to be doing for the foreseeable future until the acquisition and linking of an ORCID iD becomes truly embedded in the University's work patterns.

We started talking to academic colleagues about ORCID in the autumn, as soon as we knew about the project, gradually building up recognition of the term. The library staff have good links into various committees, meetings and training opportunities around the University and we have used these multiplicity of channels to raise awareness. Opportunities to talk to researchers have included, but not been limited to, academic unit boards, research group meetings, embedded training opportunities such as postgraduate training on e-theses, postgraduate, staff and PCAP (Postgraduate Certificate in Academic Practice) training sessions on open access, and one-to-one deskside training sessions.

Rather than do a big launch event as soon as the registration site was ready, we decided to test it out with a selected number of research groups and user communities into which we had particularly strong ties and/or knew there was already a willingness to act as beta testers for the service. These groups included both staff and postgraduate researchers. Due to the proximity of Christmas (the emails started to go out from the 20th December onwards), we were pleasantly surprised by the number of respondents and got some useful feedback. One issue, in particular, caused confusion, namely what were the actual, immediate benefits for the researcher. This was a tough question to answer as the benefits will only increase as more people and organisations adopt ORCID, and as our work on services such as

equipment.data continue. It is noticeable that the group of researchers who had initially come across ORCID as part of a funding bid process have had a proportionately higher take up of ORCID iDs than other groups where funders are not currently collecting ORCID data, thus demonstrating that when researchers can see that organisations which they deem important use ORCID then they will use ORCID. The feedback further re-enforced our view that a targeted, drip, drip approach might be more effective than an big splash.

With the New Year we have increased our promotional activity with tweets and posts on the Library blog, the University's portal and [University blog](#) as well as maintaining our activities through embedded training events, research group and academic unit meetings and personal contacts into research groups via subject librarians. As we build up the number of services which integrate ORCID within the University, and as funders start recording ORCID iDs, we will step up promotion to the relevant target groups.

We are hoping to embed ORCID into the University's standard workflows. For example, we are looking forward to working with UEL and others if the [Jisc Data Spring](#) proposal, '[Unlocking the UK's thesis data through persistent identifiers](#)', is funded. We would like to include ORCID promotion and adoption with this initiative, possibly even getting ORCID iDs capture at the same time as theses DOIs are 'coined', for example this might be included at the 'Intention to Submit' stage of the thesis workflow. Capturing our PhD students' ORCID iDs on a large, systematic scale would help us track the careers of our doctoral graduates and be able to more accurately see the worldwide reach of Southampton trained researchers. Meanwhile for staff, one of the developments we would like to pursue further is to include notifications on our Intranet if they haven't already registered their ORCID iD with us., as well as continuing the work we have begun with the national equipment.data service. Summing up, we are a long way from being finished with our publicity and promotion of ORCID iDs throughout the University.

To coin a phrase, an ORCID is for life, not just for Christmas.

This entry was posted in [academics](#).

<http://blog.soton.ac.uk/orcid/2015/01/23/getting-the-message-out/>

Important Lessons Learned

Posted on [January 21, 2015](#) by [Michael Whitton](#)

As we reach the end of the project we have reflected on our experiences, especially the lessons we have learnt.

Our project had a good strategic underpinning in the project steering group: key staff in the Library, iSolutions (IT), Research and Innovation Services and [EPrints Services](#) (who provide the software for our repository). This enabled us to get the key approval within the university research committee and iSolutions (IT).

We have a good relationship with our Legal Services department and engaged with them early in the project. This gave us a strong steer towards an opt-in model, based on our contractual obligations. We followed up the initial discussion (focusing on principles and the ORCID membership contract), looking at likely screen text and FAQs. This avoided any legal delays to 'going live'.

Engaging with researchers was aided by having an academic lead/PI, and through good academic contacts via library staff.

Learning from others was important and made preparing screen text and FAQs much easier. In particular we used information from Chalmers University of Technology and the University of Oxford. The latter was made possible through sharing of experiences at the Jisc-ARMA ORCID pilot progress workshop(s).

We had some difficulties with IT – the development took longer than expected, which is partly related to discussions around the procurement and implementation of our new CRIS. I.e. ensuring development would interface with both our ePrints repository and the new CRIS.

We have started our academic engagement and anticipate this will continue well after the end of the formal project.

This entry was posted in [academics](#), [technical](#).

<http://blog.soton.ac.uk/orcid/2015/01/21/important-lessons-learned/>

Update and Overview of our Technical Approach

Posted on [December 11, 2014](#) by [Michael Whitton](#)

Our central IT department, iSolutions have been hard at work implementing our planned ORCID service. The development is now essentially finished – we can now start on implementation.

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This has been an interesting process – the core of the service we envisioned has been created. One of the more complex elements (automating the adding of affiliation information) was not realised. Also the developer has come up with good ideas we didn't think of! E.g. giving the user a summary of the publically available information on their profile. This could be useful for someone who created an ORCID some time ago – and prompt them to update information if needed!

Our work in preparing FAQ material, and learning from other institutions (e.g. Oxford) has been valuable and time saving. We were over optimistic is our allowance for development time. This will limit the extent to which the service can be launched before the project formally ends.

This entry was posted in [technical](#).

<http://blog.soton.ac.uk/orcid/2014/12/11/update-and-overview-of-our-technical-approach/>

Summer Recap

Posted on [September 12, 2014](#) by [Isobel Stark](#)

There's a definite autumnal chill in the air in the mornings that puts a spring in your step and progress on our ORCID project is speeding up.

Much of the summer has been spent in discussions with our Legal Services over the model we will use. We seriously underestimated how much time this would take due to the legal complexities. As a result we have changed our plans slightly and now we will be asking University members to either create and ORCID id or connect their existing one rather than automatically creating an id for them. We've agreed the wording of the screen text with Legal Services which will sit within our institutional account management environment called 'Subscribe'.

iSolutions, our central IT department have now picked up the reins and are working on implementing the system. We've aiming to start outreach in later this autumn, primarily to our academic and research staff, although research students will also be encourage to sign up.

This entry was posted in [Uncategorized](#).

<http://blog.soton.ac.uk/orcid/2014/09/12/summer-recap/>

Musings

Posted on [June 5, 2014](#) by [Isobel Stark](#)

We are in our ‘thinking’ period of the project, working out how best to roll out ORCID usage throughout the researchers at Southampton to ensure the greatest uptake. We have also been attending webinars this week on the technical aspects of ORCID, which in turn has led Chris Gutteridge to blog in a personal capacity, musing about [ways to make ORCID better](#), in particular in relation to their current use of Google Analytics.

This entry was posted in [Uncategorized](#).

<http://blog.soton.ac.uk/orcid/2014/06/05/musings/>

More about the project: budget & timescales

Posted on [June 2, 2014](#) by [Isobel Stark](#)

As we enter our second month of the project, here’s a little more background.

The project is funded to the tune of £10k. iSolutions work on integrating ORCID with our systems will account for £5k, with another £2k for work on ePrints. The remaining £3k will cover staff costs in the Library related to management of the project. The cost of ORCID membership will be borne separately by the Library.

Timescales are tight and we are currently looking at the best ways to roll out ORCID membership and beginning to engage with the academic community to raise awareness of the project.

Task name	Duration	Start	Finish
Investigate ID roll out options	43 days	01/05/14	30/06/14
Deliver ID roll out	66 days	01/07/14	30/09/14
ORCID examples in HR database	89 days	01/07/14	31/01/15
ORCID examples in ePrints	89 days	01/07/14	31/10/14
Engagement with NCS	176 days	02/06/14	31/01/15

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Engagement with all researchers	176 days	02/06/14	31/01/15
Engagement with equipment.data group	176 days	02/06/14	31/01/15
Coms with other projects/wider community	198 days	01/05/14	31/01/15

This entry was posted in [welcome](#).

<http://blog.soton.ac.uk/orcid/2014/06/02/more-about-the-project/>

Sotonians on ORCID

Posted on [May 16, 2014](#) by [Isobel Stark](#)

173 people with ORCID researcher IDs mention Southampton in their profile. Are all of them with the University? At the moment we can't tell but we're working on it!

This entry was posted in [academics](#).

<http://blog.soton.ac.uk/orcid/2014/05/16/soton-staff-with-orcid/>

Project Aims

JISC has blogged about the [overall aims for the project at a national level](#). Here at Southampton our particular pilot will be taking a three tiered approach with a combination of:

- a roll out of ORCID ID for all researchers with institution-wide impetus
- focus on a specific proof-of-concept exemplar working with the equipment focussed research community
- services working in partnership with research groups to support cultural engagement and researcher-led uptake

The use case will demonstrate the power of the ORCID ID to maximise links between the researcher's identity, the researcher's outputs, the researcher's use of equipment/facilities, the necessary use of institutional systems and potential enhancements to the availability of data for national services. We are working with equipment.data to establish how ORCID IDs could be used to link publication information to equipment and with EPrints Services to associate ORCID IDs with institutional repository records. The ePrints Soton repository recently implemented a

means to link publications to grants with information from Gateway to Research. We will explore how linking to ORCID's can support both more detailed impact narratives and the potential to improve workflows by reducing steps and automating data exchange.

<http://blog.soton.ac.uk/orcid/sample-page/>

Project People

Isobel Stark, co-Project Manager (<http://orcid.org/0000-0002-8026-3315>)

Isobel is an academic liaison librarian with a special interest in research support having previously worked on the implementation of etheses and the RCUK open access policy at the University.

Michael Whitton, co-Project Manager (<http://orcid.org/0000-0001-6838-1100>)

Michael is also an academic liaison librarian with a particular focus on digital services. He has previously worked on the [DataPool](#) and [IDMB](#) projects and also is part of the Library's teams for ePrints Soton testing and REF submission.

Simon Coles, Principle Investigator (<http://orcid.org/0000-0001-8414-9272>)

Simon is the Director of the [National Crystallography Service](#) and Senior Lecturer. As an author/coauthor of over 500 journal articles and conference proceedings and is also ranked the 48th most published crystallographer of all time and is the current chair of the British Crystallography Association. He has diverse research interests ranging from structural systematics and high-resolution crystallography, through crystal growth and x-ray imaging to the development of new information technologies for recording and sharing research data. His contribution to the latter includes 10 years experience in winning and running Research Data/Management projects which total >£3m funding from JISC, Hefce, Microsoft, EPSRC & the Royal Society of Chemistry. Simon serves on numerous editorial boards (5 journals), peer review committees and strategy or advisory boards – including the Jisc Research Identifier group that drew up this particular programme.

Adrian Cox, Steering Committee

As Research Programme Manager for the Department for Transport (DfT) Adrian was joint project manager for the Phase 2 development of the DfT Research Management Database and contributed to the DfT "Data" Grand Challenge. After leaving the DfT, in 2006 to join the HE sector, Adrian has project managed the core strand of Enterprise Review for Bournemouth University (BU), successfully facilitated the JISC funded CRM Process Review Project at BU and since joining

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University Southampton Research and Innovation Services project managed the development the University's Research Facilities and Equipment Sharing database and the collaborative project, UNIQUIP, defining standards for research equipment databases. Adrian is currently leading the RCUK (EPSRC) funded project [equipment.data](#), the national equipment data portal, using linked open data standards to deliver a national research equipment data aggregation and search capability.

Chris Gutteridge, Steering Committee (<http://orcid.org/0000-0001-9201-5987>)
Christopher Gutteridge is an award winning developer and member of the University Innovation and Developer team, but embedded with the [Web & Internet Science Research Group](#) (WAIS). For many years he was lead developer of the [EPrints](#) Repository platform. More recently he designed and implemented the [University of Southampton Open Data Service](#), which has served as a model for new organisation open data services. The Open Data service won the Times Higher Education award for outstanding IT initiative of the year. Christopher is currently launching services for [data.ac.uk](#) including [equipment.data.ac.uk](#) and the latest service; [observatory.data.ac.uk](#) which will provide a source of data to web strategists and web scientists.

Wendy White, Steering Committee (<http://orcid.org/0000-0002-4509-5600>)
Wendy White is Head of Scholarly Communication at the [University of Southampton Library](#) where she leads the co-ordination of cross-service research data management support. She has been involved with a range of JISC projects relating to initiatives in open access, repositories, research data and digitisation. Most recently from 2011-13 she was Principal Investigator for the [DataPool](#) project. Her work embraces strategic, policy and service developments across all elements of the research lifecycle and she has contributed to a range of national committees. For many years she was a member of the SCONUL Working Group on Information Literacy and she represents Research Libraries UK on the Research Information and Digital Literacies Coalition where she recently led a strand of activity on open data. She was an advocate for green open access on the Repositories Sub-Group of the Finch Working Group, has recently contributed to HEFCE's REF Data Collection Steering Group and is participating in the Russell Group Open Data Working Group.

Mark Foster

Mark is Head of Development in iSolutions, the University's IT and computing service.

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Peter Staniczenko

Peter is Head of Research Performance within Research & Innovation Services at the University.

John Darlington

John works for ePrints Services, the University's spin out company which develops the ePrints software.

<http://blog.soton.ac.uk/orcid/project-people/>

FAQs

This page is a work in progress. If you have a questions, please ask!

What is ORCID?

ORCID is an open, non-profit, community-driven effort to create and maintain a registry of unique researcher identifiers and a transparent method of linking research activities and outputs to these identifiers. ORCID research IDs are being used worldwide by researchers to uniquely identify themselves and their work.

How does this pilot link in with other initiatives?

Within the UK, the Soton pilot is part of a [larger pilot](#) funded by JISC. Other universities involved in the pilot are: Aston, Imperial, Kent, Oxford, Northumbria, Swansea and York.

Where did you get your header image?

The lovely image of orchids is courtesy of freewordpressheaders.com

<http://blog.soton.ac.uk/orcid/faqs/>