ORCID

Manage your digital identity with ORCID

Version of August 2023
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1 Why create your ORCID Researcher ID

ORCID is a not-for-profit organization, sustained by fees from our member organizations (https://orcid.org/about).

ORCID provides a persistent digital identifier (an ORCID iD) throughout the career for all persons involved in research, innovation or academic activities. The ORCID ID is a unique alphanumeric code assigned to the researcher’s name.

You can connect your iD with your professional information — affiliations, grants, publications, peer review, and more. You can use your iD to share your information with other systems, ensuring you get recognition for all your contributions, saving you time and hassle, and reducing the risk of errors.

ORCID allows:
- solving author name ambiguity in scientific publications
- minimizing the time spent by the researcher filling out forms and personal information
- simplifying reporting and analysis
- increasing visibility with the international scientific communities
- interoperability with numerous institutions, funders and publishers as well as data providers.

The University of Fribourg recommends creating the ORCID identifier and linking it to the directory web page through MyUnifr.

The Swiss National Science Foundation asks applicants to enter their ORCID iD when applying for funds.
2 How to obtain an ORCID identifier

Before creating your ORCID ID, first check if you already have one, via the search engine on the ORCID site. You may have created an ORCID identifier, for example by publishing in a journal that uses it, and then forgotten it.

2.1 Existing user

- On the webpage: https://orcid.org/
- Search for your name in the “Registry” case on the top right of the page
- If your name is displayed, check that you are behind it

If you have previously created an ORCID account, and you wish to retrieve your ID

- On the webpage: https://orcid.org/
- Click on “Sign in/ Register” on the top right of the page, you can also choose the language
- Sign in with your registered email address, or ORCID iD. If you forgot your password, retrieve it via "Forgotten your password"
- You can also sign in with a social media account such as Google or Facebook
2.2 New user

If you are new to ORCID and haven’t got an ORCID account, register on https://orcid.org/ in 3 easy steps.

- Click on the button “register now”
- Input your name, email, and create an ORCID password.
- Choose the visibility setting: everyone, trusted parties, or only me.
- Your ORCID ID is always publicly visible, and you control the visibility settings for all other content in your ORCID record.
- Check the box for accepting Terms of Use. Then click on the Register button to complete the process.
- After registration, you can now add your publications into your ORCID profile and link your ORCiD ID on “My Research Activities” section at “MyUnifr”.

Unifr: SPR: Manual: Manage your digital identity with ORCID, 06.2023
Register for an ORCID ID

ORCID provides a persistent digital identifier that distinguishes you from every other researcher and, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between you and your professional activities ensuring that your work is recognized.

Per ORCID's terms and conditions, you may only register for an ORCID ID for yourself.

First name

Last name (optional)

Primary email

Additional email (optional)

Add another email

Password

8 or more characters

1 letter or symbol

1 number

Confirm Password

Visibility settings

Your ORCID ID connects with your ORCID record that can contain links to your research activities, affiliations, awards, other versions of your name, and more. You control who can see the information in your ORCID record.

By default, who should be able to see information added to your ORCID Record?

- Everyone (31% of users choose this)
- Trusted parties (9% of users choose this)
- Only me (6% of users choose this)

Notification settings

ORCID sends email notifications about items related to your account, security, and privacy, including requests from ORCID member organizations for permission to update your record, and changes made to your record by those organizations.

You can also choose to receive emails from us about new features and tips for making the most of your ORCID record.

- Please send me quarterly emails about new ORCID features and tips

To resolve these, you will also need to verify your primary email address.

After you’ve registered, you can change your notification settings at any time in the account settings section of your ORCID record.
3  Set up your ORCID Profile

3.1  Enrich your record

After registering in ORCID, you can add in more information to enrich your profile, including:

- **Name variants** (if any)
- **Keywords** (research interests)
- **Websites** (e.g. Dept profile, ResearchGate, Mendeley, Google Scholar)
- **Email**: an email address where you could be joined even after leaving the institution
- **Other IDs** (e.g. Scopus Author ID, ResearcherID). These author identifiers will be automatically added after linking ORCID with the database system (Scopus, Publons, CrossRef...).

**Video “How to register to ORCID”**
3.2 Account setting

In “Account settings” in your ORCID record, edit your email address(es), notification preferences, password, visibility preferences, and two-factor authentication. You can also remove a duplicate record by merging it into your primary record, deactivate your account, or download all data on your ORCID account.

3.3 ORCID record visibility settings

Your ORCID iD is always publicly visible, and you control the visibility settings for all other content in your record.

There are three visibility settings: everyone, trusted parties, or only me.

- Everyone: Information marked as everyone can be viewed by anyone who comes to the orcid.org website.

- Trusted parties: Limited-access information that can be seen by any organisation or individual whom you have granted access to your ORCID record. These connections require explicit action on your part.
Once you have granted permission, the trusted organization will be able to see information that you have set as visible to trusted parties in addition to the information set as visible to everyone.

- **Only me**: Private information can only be seen by you and trusted individuals you have granted access to help administer your ORCID record on your behalf.

### 3.4 Default visibility settings on registration

When you register:

- the default visibility setting of your name is everyone,
- the default visibility setting of your email address(es) is only me.

You can immediately update the visibility of these items after registration by changing the visibility selector next to them.

You can update your default visibility settings for any new information added to your ORCID record in the visibility preferences tab of your ORCID account settings.

### 3.5 Change the visibility of individual items on your ORCID record

Visibility setting for each item individually could be change at any time, for the existing data or new added items.

#### 3.6 Delegate the management of your profile in ORCID

You can delegate the management of your profile to another person, designated as a trusted person. This person must be registered with ORCID. The designated trusted person will be able to update all sections of your profile.

- Log in in your ORCID account
- Go to your “Account settings”, on the top right of the page under your name
- Click on Trusted parties
- Go to the section “**Trusted individuals**”

**Trusted individuals**

Search for ORCID users to add as trusted individuals.

[Search]

- Find the person's account by entering their name, email or ORCID iD
- Click **Search** to the right of the person's name.
- You can revoke a delegation at any time. Simply click on the trash icon to the right of the trusted name.
- The trustworthy can switch between his/her account and the account entrusted to him/her.
4 Import works in your ORCID record

**Works** are your research outputs: publications, data sets, conference presentations, videos... Allowing trusted organizations to add information to your record ensures the data connected with your ORCID iD is trustworthy, as well as saving you time entering information manually.

There are four ways to add works to your ORCID record:

- **Add works by direct import from other systems** to import links to your publications and other works to your ORCID record from other databases. This is the recommended process because it reduces or eliminates errors, and enables a reliable connection between your ORCID iD and your works
- **Add works using an identifier**
- **Importing works from a BibTeX file**
- **Add works manually**

4.1 Add works from another systems

Several organizations have built search and link tools that allow you to import information about publications and other works into your ORCID record from other databases and also allow auto-update. The linking process can begin on the ORCID site, or at the organization’s website.

“Search and Link” wizards make adding works easy and accurate and allow the addition of contributor information.

In general, the login process is simple and intuitive to follow.

Currently supported search and link wizards are: Airiti, BASE, CrossRef Metadata Search, DataCite, DNB, Europe PubMed Central, ISNI, MLA International Bibliography, Redalyc, Research Data Australia, Publons (ex-ResearcherID), *Scopus* - Elsevier, …Auto-update is triggered when the researcher submits an article to a journal and provides ORCID iD.

4.1.1 Add works from Scopus – Elsevier

All publications indexed in Scopus can be added to ORCID iD, either through “connect to ORCID” from Scopus, or “Search & link” from ORCID.

- Login to ORCID
- Under “Works” >” + Add Works” > “Search & link”. Then click on “Scopus - Elsevier”.

*Unifr: SPR: Manual: Manage your digital identity with ORCID, 06.2023*
- Select the profile(s) that contain publications authored by you, click on “Next”

Select your Scopus profiles
Please select all profiles that contain publications authored by you and click the next button to continue

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<td>Immunochemistry and Molecular Biology, Medicine, Chemistry, Environmental Science</td>
<td>University of Fribourg</td>
<td>Fribourg</td>
<td>Switzerland</td>
</tr>
</tbody>
</table>

- Select the preferred profile name then “Next”

Select the preferred profile name
Please select the preferred name for your unique author profile.

- Review your authored publications and remove those that do not belong to you.
- Click on “Search for missing documents” to search for publications that are not on the list.
- Check if all your publications are included in your profile before clicking on Next. If not, click back and search again.

- Enter your email address and click “Send Author ID”

- Click on “Send my publication” list to add your publications to ORCID. Your publications in Scopus will then be added to your ORCID profile.

- You can click on “return to ORCID” to see the publications added to your ORCID.
You can only add publications from Scopus to ORCID, not the other way around.

4.1.2 Add works from CrossRef Metadata search

Crossref is an official Digital Object Identifier (DOI) Registration Agency. **CrossRef Metadata Search** via ORCID platform allows you to search the metadata of millions of journal articles, books, etc, by title or DOI, and add works to ORCID profile

If you have some publications that cannot be retrieved from Scopus or Web of Science (ResearcherID), you may try CrossRef before doing it manually.

- Under Works, click on “+ Add Works” and then “Search & link”.
- Select “CrossRef Metadata Search” from the list.
- Click “Authorize” to allow CrossRef Metadata Search to add publications to your ORCID.

- Search by DOI or title to locate the article. Then, select the work you wish to add and click on Add to ORCID.
- CrossRef indicate if the work is already in your profile.
The publications will appear listed under works in your record with CrossRef Metadata listed as the source.

4.1.3 Add works from ISNI

The International Standard Name Identifier (ISNI) is a recognized global ISO standard for the unique identification of contributors to creative activity.

By linking your ORCID with your ISNI record, you link information from both records.

- Under Works, click on “+ Add Works” and then “Search & link”.
- Select “ISNI” from the list.

- Click “Authorize access” to allow ISNI Search to add publications to your ORCID.
- If the search did not return any results, you can attempt a manual name in the search

- Select manually the record belong to your name and choose ‘add ORCID to ISNI’ once you identify your ISNI record; and save the result
after you have added your ORCID ID to ISNI, choose ‘add ISNI to ORCID’ and be directed to your ORCID record.
- To remove ORCID from ISNI: Within your ISNI record, choose ‘remove ORCID from ISNI’ and save the updated record.

4.1.4 Add works from MLA International Bibliography

Search the MLA International Bibliography for your works, including those published under variant names, and add them to your ORCID profile with one click.

- Under Works, click on “+ Add Works” and then “Search & link”.
- Select “MLA International Bibliography” from the list.
- Click “Authorize access” to allow ISNI Search to add publications to your ORCID.
If your search did not return any results, refine your search and try again.

4.2 Adding works using another identifier

4.2.1 Add works with DOI, PubMedID

It is possible to add works using DOI (Crossref, DataCite, and mEDRA), or PubMed ID.

- Go to the section Works, +Add works then Add DOI, or Add PubMed ID:

- Input the DOI or PubMed ID of the work, click on Retrieve work details from DOI/PubMed.

- Finally, verify the work details and click on Add this work to your ORCID record.
4.2.2 Adding works with a BibTeX file

Many databases allow the export of references in “.bib” format. These .bib files should include as much information as possible.

You can import works from different tools such as the Bibliothèque Cantonal et Universitaire de Fribourg (BCU), Reference Manager, RefWorks, Papers, Google Scholar Library, ReadCube, etc., by exporting to a standardized reference format BibTeX format (.bib), and then importing into ORCID to integrate the references into the profile.

You will be listed as the source for works added using the BibTeX import tool, and you can manually edit these works after you have imported them.

- Start from the Works section, go to Add, then select Add BibTeX.

- Choose the BibTeX file to import

- You will be presented with the list of Works found in the BibTeX file, select those that you wish to import into your ORCID profile, or alternatively select them all.
- Click on **Import works to your record** and the works will be added to the list of works in your ORCiD profile.
- The publications will appear listed under **Works** in your record with you clearly listed as the source.

For more information about importing BibTex files into ORCiD you can visit: [https://support.orcid.org/hc/en-us/articles/360006894794-Importing-works-from-a-BibTeX-file](https://support.orcid.org/hc/en-us/articles/360006894794-Importing-works-from-a-BibTeX-file).
4.2.3 Importing works from Google Scholar

If you have a Google Scholar profile, you can export your works in BibTeX file from Google Scholar and import them into ORCID. Google Scholar, is interesting as long as the researcher has an up-to-date profile in Google Scholar. If the researcher has significant amount of grey literature in his or her profile, the use of Google Scholar can be useful.

- Select “My profile” in “scholar google”
- Select works to exports

BibTeX format exported from Google Scholar do not contain DOIs. ORCID mainly uses DOI to de-duplicate publication records. The same works will be shown in two records: one with DOI (e.g. from Scopus) and one without from Google scholar. Try to selectively import publications from Google Scholar only for those are not covered by other sources.

- Export the BibTeX file, right click and select Save as to save the file.
- Follow the procedure of the previous section (4.2.2) to add the works to your ORCiD record.
4.2.4 Importing works from the Bibliothèque cantonale et universitaire (BCU)

The catalogue of the Bibliothèque Cantonale de Fribourg (BCU) is particularly interesting for the researchers from the social sciences. However, just as with Google Scholar, it should be left as a last resource to import records into your ORCiD account, since the bibliographic quality of the records cannot be guaranteed. Very often, there are missing fields in the records like DOIs, ISBN or links, other times the actual type of work is not clearly defined, then once the record is exported to ORCiD it appears in the category of “others” instead of a book chapter or journal publication.

If you want to import a list of works from the BCU, follow the next steps:

- Go to https://bcufr.swisscovery.slsp.ch, you can select the displayed language in the top right corner.
- Make an author search by your name in the search field:

```
Erlan Oshaa Martinez
```

- Refine the results using the bar at the left of the screen, for example selecting the appropriate author, years of publication, and resource type:

```
Tweak your results
Search by: Relevance
Sort by: Relevance
Show only: Available in university libraries
  - Online - Print - Print access
- Online - Print - Print access

BCU Fribourg
swisscovery libraries
swisscovery libraries
BCU Fribourg
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Resource Type
- Articles (2)
- Magazines (2)

Search in full text (239)

[Submit query]

[Set language]

[Refine]
```
```

- Select the records that you wish to export, or alternatively click the box on the top of the list of results to select them all.
- Then, click on the 3 dots at the right, on top of the list of results.
- Select **EXPORT BIBTEX**, and then **DOWNLOAD**.

- Once you have downloaded your .bib file, follow the procedure of section 4.2.2 (Adding works with a BibTeX file) to add the works to your ORCiD record.
- For more information regarding BibTeX files in ORCiD, visit the [BibTeX Help Section](#).

### 4.2.5 Importing works from Zotero

To import a list of works from Zotero.

- In Zotero, select the **library or collection** to be exported;
- Click on File > “**Export Library**”;
- Select the **BibTeX format** in the window and the desired converter options and click Ok;
- In the window that appears, select the directory where the LaTeX file is located;
- Give the file a name and save.
- Upload the file in ORCID
4.2.6 Importing works from Citavi

To create a BibTeX file, in Citavi,

- on the “File menu”, click “Export”
- Export all of the references in your project as a BibTeX file
- Select BibTeX as the format. Click “Next”
- Save the file and upload it in ORCID.
- By default, Citavi exports the contents in BibTeX.

4.2.7 Importing works from EndNote

Open the EndNote Desktop containing the references you want to export to ORCID:

- create a group of the references you want to export.
- EndNote Desktop will only export the references currently displayed. Click on the group you want to export OR on "All References" in the side menu

- Click "File" then "Export"
- Uncheck the "Export Selected References" box

- Select "BibTeX Export" as your Output Style
- Click "Save" and save the file to your computer
- Add works to ORCID in “Add works”, then select “Import BibTeX” and select the file.

4.2.8 Importing works from Mendeley

Mendeley provides the ability to export your library in BibTeX (.bib) formats.

From Mendeley desktop:
- Highlight the references you wish to export.
- Go to 'File' and click 'export'.
- Highlight the references you wish to export.
- Select the format you wish to export as and click 'save'. This will generate a file you can then save to your machine.
- Add works to ORCID in “Add works”, then select “Import BibTeX” and select the file.

4.2.9 BibTeX import errors

ORCID recommend that you only use BibTeX to import/export works if there is no other option.
- Limited grouping: Works are grouped in your ORCID record based on unique identifiers. Since BibTeX only supports a limited number of identifiers (DOI, ISBN, ISSN), if your imported work does not include an identifier, it may not group on your record.
4.3 Add works manually (See the screenshot)

To add a work yourself,

- click on "+Add work", then on "Add manually", a box will appear enabling you to complete for a manual work quotation.

- Fill in the required information
- ORCID allows adding different categories of works: Publications, Conference, Intellectual properties, Others).
- It is highly recommended to also fill in the identifier of the work, e.g. DOI for journal articles, or ISBN for books. If no identifier is available, fill in a URL.
- After completing the form, click Add to list to submit.
5  Edit works

5.1  Edit Works manually

You can edit works that you have added to your record (manually or via BibTeX) yourself. Your name will be shown as the source for these works. Click on the “pencil” icon to open the editing window.

Works added by another source, such as via a Search & Link wizard, cannot be edited directly.

- “copy and edit” icon create a copy of the information added by the third-party source, which you can then edit. This copy will be saved as a new version of the work, with you as the source. Only works that have an external identifier can be copied.

5.2  Group multiple versions of the same work together

The same work can be added to ORCID record from different sources. Where these works have a common identifier (such as a DOI, ISBN, etc.), they are automatically grouped together. If a work does not have an identifier, it cannot be grouped.

Each group of works is shown in a single box. To see other versions of the work, click on the number next to the Preferred source indicator.
You can toggle between different versions of the work by clicking on the source information.

You can set which version of the work you would like to display publicly by clicking on “Make preferred”.

The full details of the work can be displayed by toggling the “arrow”.
5.3 Eliminate the duplicated records

Check for duplicated records

- By clicking on the number of duplicates, you can see the “Source” of the record
- When it is possible give preferences to the Editor source

- Otherwise check the metadata and give preference to the most complete metadata

5.4 Delete works

Next to each version of a work in your record, there are buttons to set the visibility and delete (“trash can” icon), which can be used to delete the work. You will be asked to confirm the deletion before the work is removed. If you have multiple versions of a work, you will need to delete each version individually.
6 Add peer review works

Peer reviews can only be added by a trusted organization.

This can be done by the organizer of the review or evaluation, such as a publisher, society, funder, or research institution, or it can be done by a third-party review recognition service, such asPublons.

In order for your ORCID record to be updated, you will need to grant the review organizer recognition to update your ORCID record with information about your review contribution.
7 Add funding

Import your awarded grants from funding organizations worldwide such as the SNSF in Switzerland, NIH and NSF in the United States, the UK Research Councils and Wellcome Trust in the UK, the Austrian Research Council, and over fifty others.

Two ways to add funding:

- DimensionsWisard, add your grants to your ORCID record with a few simple clicks.
- Or manually

![ADD FUNDING](image)

**FUNDING AGENCY**
- Funding agency display name
- Type name. Select from the list to fill other fields
- Funding agency display city
- Add funding agency city
- Funding agency display region
- Add funding agency region
- Funding agency display country
- Select a country

**GRANT NUMBER**
- Grant number
- Enter grant number
- Grant URL
- Enter grant URL
- Relationship
- Self
- Part of
- Alternate URL
- Add another grant number
- Add URL
8 More supports for building your ORCID records

- “Works” and “Peer Review”
- Exporting works into a BibTeX file
- BibTeX issues and troubleshooting
- Group multiple versions of the same work together
- Edit works
- Peer Review

Short videos on https://orcid.org/help show how to register for ORCID iD, and how to make changes to the folder, such as changing the name and adding publications and other work using the "Search and Link" wizards.
Once you register, lists of your works appear in MyUnifr under "My Research, Publications and Commitments" as well as on your web page in the directory of the University.
9 Annexe:

9.1 Trusted organisations, update research

ORCID Read your information with visibility set to Trusted Parties, add/update your research activities (works, affiliations, etc)

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9.2 List of organisations that get your ORCID iD

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Organisation</th>
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</thead>
<tbody>
<tr>
<td>DMP Canvas Generator</td>
<td>MLA International Bibliography</td>
</tr>
<tr>
<td><a href="https://dmp.vital-it.ch">https://dmp.vital-it.ch</a></td>
<td><a href="http://biblink.mla.org">http://biblink.mla.org</a></td>
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<tr>
<td>Dove Medical Press</td>
<td>OpenAire2020 Portal</td>
</tr>
<tr>
<td><a href="http://www.dovepress.com">http://www.dovepress.com</a></td>
<td><a href="https://www.openaire.eu">https://www.openaire.eu</a></td>
</tr>
<tr>
<td>Elsevier Editorial</td>
<td>PubFacts</td>
</tr>
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<td><a href="https://ees.elsevier.com">https://ees.elsevier.com</a></td>
<td><a href="https://www.pubfacts.com">https://www.pubfacts.com</a></td>
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<tr>
<td>ezDMP</td>
<td>ProQuest</td>
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<td><a href="http://dev.ezdmp.org">http://dev.ezdmp.org</a></td>
<td><a href="https://www.proquest.com/index">https://www.proquest.com/index</a></td>
</tr>
<tr>
<td>H2020</td>
<td>ScholarOne Manuscripts</td>
</tr>
<tr>
<td>Wellcome</td>
<td>SciCV</td>
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<td><a href="https://scicv.ch">https://scicv.ch</a></td>
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<td>IDNum</td>
<td>SONAR</td>
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<td>Impactstory</td>
<td>Swiss edu-ID</td>
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<td><a href="https://impactstory.org">https://impactstory.org</a></td>
<td><a href="http://projects.switch.ch/eduid/">http://projects.switch.ch/eduid/</a></td>
</tr>
<tr>
<td>Loop</td>
<td>ZENODO</td>
</tr>
<tr>
<td><a href="http://loop.frontiersin.org">http://loop.frontiersin.org</a></td>
<td><a href="http://zenodo.org">http://zenodo.org</a></td>
</tr>
</tbody>
</table>

9.3 List of reference managers, import your works in ORCID in a BibTex file

By exporting to a standardized reference format, BibTeX, and then importing into ORCID by clicking

<table>
<thead>
<tr>
<th>Reference Managers</th>
<th>Reference Managers</th>
</tr>
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<tbody>
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<td>Citavi</td>
<td>JabRef</td>
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<td><a href="https://www.citavi.com/fr">https://www.citavi.com/fr</a></td>
<td><a href="http://dev.ezdmp.org">http://dev.ezdmp.org</a></td>
</tr>
<tr>
<td>EndNote</td>
<td>Mendeley</td>
</tr>
<tr>
<td>Figshare (DataCite)</td>
<td>ReadCube</td>
</tr>
<tr>
<td>Google Scholar</td>
<td>Zotero</td>
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</table>