ORCID Integration

Since DSpace 7.3 a bidirectional ORCID integration is available for DSpace. This feature allows for authentication via ORCID, as well as synchronizing data between ORCID and DSpace, via the usage of Researcher Profiles.

Acknowledgments

The ORCID integration was originally developed by 4Science in DSpace-CRIS. It is the result of years of collaboration with several institutions and the ORCID team that has helped to correct, improve and broaden the scope of the integration. We want to thank the University of Hong Kong that was the first institution to fund development activities in this regard back in 2015 and the TUHH Hamburg University of Technology that have funded the initial porting of the ORCID integration to the new Angular/REST architecture introduced in DSpace 7. Last but not least, funds have been received by the DSpace community to port this feature from DSpace-CRIS to DSpace.

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Overview

DSpace provides a bidirectional integration with ORCID based on the ORCID API v3.0. Both the Public ORCID API and the Membership API are supported.

The table below summarizes the supported features according to the type of ORCID API configured.

<table>
<thead>
<tr>
<th>Feature</th>
<th>No credentials*</th>
<th>Public API</th>
<th>Member API</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentication</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Connect local profile to ORCID (authenticated ID)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>ORCID Registry Lookup - import Person records</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>ORCID Registry Lookup - as authority</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Import publication from ORCID</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Push biographic data to ORCID</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Push publications to ORCID (works)</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Push projects to ORCID (fundings)</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

* No credentials: please note that ORCID strongly recommends to apply at least for a free public API Key as this will help to trouble-shoot integration problems and get support from ORCID. There is also a chance to get better performance/priority over “unknown” client.

User features

Login via ORCID

Once enabled, an option to login via ORCID is provided to the user among the other authentication methods configured in the system. The ORCID authentication doesn’t allow the user to reset his password from DSpace.
Connect/Disconnect the local profile to ORCID

The researcher can connect (or disconnect) their DSpace local Researcher Profile with ORCID from the Person item detail page.

ORCID Authorizations

No ORCID ID associated yet. By clicking on the button below it is possible to link this profile with an ORCID account.
Once a profile has been connected they can manage their synchronization preferences deciding what should be pushed to ORCID, including:

- biographic data
- Publication (entities) linked with their Researcher Profile. (Publication entities are synced to Works in ORCID.)
- Project (entities) linked with their Researcher Profile. (Project entities are synced to Fundings in ORCID.)

**NOTE:** The ORCID synchronization feature is disabled by default, even when ORCID Authentication is enabled. See Configuration section below for how to enable it.
The synchronization can happen automatically over the night or manually. The list of information that should be pushed or updated from DSpace to ORCID is presented in a queue and can be manually discarded or immediately pushed by the researcher.

**Import publications from ORCID**

It is possible to import a publication from ORCID using the "Import from external sources" button in the home page. Once you select the Publication entity type you will be able to find ORCID as a Source and you can get the list of publications (ORCID works) that appear in an ORCID profile by searching for its ORCID iD.

**Configuration**

**Enable the integration**

All the ORCID features require a minimal common set of properties to configure in the `local.cfg`
To enable the main integration (i.e. connect a local profile with ORCID and push data to the ORCID registry) you need to be an ORCID Member, get a Member API Key and properly enable and configure the feature in DSpace. To test ORCID integration, it's possible to use the ORCID Sandbox (without being an ORCID member). However, to do so, you must request a Sandbox Member API Key.

In the ORCID API Credentials request form you will be asked to enter one or more redirect URLs for your application (DSpace). You will need to enter here the root URLs of your REST and Angular interfaces, which could be different. Otherwise it will be sufficient to enter the URL of your Angular UI. For example, for the DSpace 7 official demo these are:

- Angular: https://demo7.dspace.org (please note the absence of a /home or any subrouting)
- REST: https://api7.dspace.org (please note the absence of a /server or any subrouting)

Once ORCID has reviewed and approved your request, you will get from them the Client ID and Client Secret that need to be set in the local.cfg among other properties. See the configuration examples above.

Please note that by default DSpace will request permissions to READ and WRITE all the information from the ORCID profile, as this will enable support for all of the features. You can fine-tune that by overriding the following properties. Please note that if you are going to configure Public API Credentials you MUST update this configuration keeping only the authenticate scope as all the other scopes require Member API.

```bash
# The scopes to be granted by the user during the login on ORCID (see https://info.orcid.org/faq/what-is-an-oauth-scope-and-which-scopes-does-orcid-support/)
orcid.scope = /authenticate

# The below scopes are ONLY valid if you have a Member API Key. They should be commented out if you only have a Public API Key
orcid.scope = /read-limited
orcid.scope = /activities/update
orcid.scope = /person/update
```

To enable **ORCID Authentication** you need to uncomment the following line in the `modules/authentication.cfg` file or add it to your `local.cfg`

```bash
plugin.sequence.org.dspace.authenticate.AuthenticationMethod = org.dspace.authenticate.OrcidAuthentication
```

Please note that you are NOT required to enable the ORCID Authentication to use the other ORCID features, including the synchronisation ones. It is also possible to use just the ORCID Authentication without enabling all the other features.

When a user logs in via ORCID the system will attempt to reuse an existing account looking up by email. If none is found then a new account is created in DSpace. It is possible to disable the creation of new accounts by setting the following property:

```bash
authentication-orcid.can-self-register = false
```

To enable **ORCID Synchronization**, you need to uncomment the following or add it to your `local.cfg`
The push of DSpace data (Person, Publication, Project) to ORCID is based on mappings defined in the `config/modules/orcid.cfg` file. You will find details below in the dedicated paragraphs.

The ORCID Synchronization features depend on other features that must be enabled: DSpace User Profile, Configurable Entities at least Person, Publication, Project & OrgUnit.

The synchronization features are classified as *experimental* at the time of 7.3 and it **MUST** be enabled manually. Due to the strict validation rules applied on the ORCID side and the absence of friendly edit UI for the archived items in DSpace (see issues#2876), it is hard at this time to achieve an optimal UX.

### Configure the push of information from DSpace to ORCID

Please note that many fields on the ORCID side are subject to validation, i.e. only values from controlled-list can be used and some fields are mandatory. The table below summarizes the validations that are defined at the time of DSpace 7.3. ORCID updates such rules periodically, usually modifying (enlarging) the controlled-list, and changes to the mandatory fields can also happen.

<table>
<thead>
<tr>
<th>ORCID Entity</th>
<th>Corresponding DSpace Entity</th>
<th>Mandatory fields</th>
<th>Controlled fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person</td>
<td>Person</td>
<td>Country (iso-3166 2 code letter)</td>
<td></td>
</tr>
</tbody>
</table>
| Work          | Publication                | Title, Type, Publication Date (>= 1900), External Identifier (at least one)      | Type ([https://info.orcid.org/documentation/integration-and-api-faq#easy-faq-2682](https://info.orcid.org/documentation/integration-and-api-faq#easy-faq-2682))
|               |                            |                                                                                  | Identifier.Type ([https://pub.orcid.org/v3.0/identifiers](https://pub.orcid.org/v3.0/identifiers)) |
| Funding       | Project                    | Title, External Identifier (at least one), Funding Agency (Organisation)         | Amount.Currency ([https://www.iso.org/iso-4217-currency-codes.html](https://www.iso.org/iso-4217-currency-codes.html)) |
|               |                            |                                                                                  |                                                                                  |
| Organisation  | OrgUnit                    | External Identifier (at least one), Address, City, Country                       | See [https://support.orcid.org/hc/en-us/articles/360006894674-Metadata-in-the-Funding-section](https://support.orcid.org/hc/en-us/articles/360006894674-Metadata-in-the-Funding-section)
|               |                            |                                                                                  | Country (iso-3166 2 code letter)
|               |                            |                                                                                  | Identifier.Type (ROR, LEI, CrossRef Funder ID, RINGOLD, GRID) |

To provide more meaningful messages to the user DSpace implements a local validation before trying to push the record to ORCID. This validation verifies the data using the rules above so that a specific message is displayed to the user. If for any reason another error is returned by ORCID a generic message is shown to the user and the exact technical message received by ORCID is logged in the `dspace.log` file and stored in the `orcidhistory` table.

The local validation can be turned off. This validation is mainly intended as a development/debug option and should be not enabled in production.

```text
orcid.validation.work.enabled = true
orcid.validation.funding.enabled = true
```

### Mapping of the DSpace Person Items to ORCID Works

Metadata in a DSpace "Person" item, once that the item has been linked to ORCID by the researcher owning the ORCID profile, can be pushed to ORCID to fill the Profile Section of the ORCID Person using the `org.dspace.orcid.service.OrcidProfileSectionFactoryService` configured via this mapping bean:
The above configuration links each piece of information that can be synchronized from DSpace to ORCID with a preference that the user can manage on the DSpace side (i.e. sync of the keywords is linked to the BIOGRAPHICAL preference) and defines which DSpace metadata will be used to fill the ORCID field. The bean reads the metadata mapping from the config/modules/orcid.cfg

### Other names mapping ###

orcid.mapping.other-names = person.name.variant
orcid.mapping.other-names = person.name.translated

### Keywords mapping ###

orcid.mapping.keywords = dc.subject

### Country mapping ###

orcid.mapping.country = person.country
orcid.mapping.country.converter =

### Person External ids mapping ###

orcid.mapping.person-external-ids = person.identifier.scopus-author-id::SCOPUS
orcid.mapping.person-external-ids = person.identifier.rid::RID

### Researcher urls mapping ###

orcid.mapping.researcher-urls = dc.identifier.uri

Mapping of DSpace Publication items to ORCID Works
A DSpace "Publication" item is pushed to ORCID as a "Work" using the `org.dspace.orcid.model.factory.impl.OrcidWorkFactory` configured via this mapping bean:

```xml
<bean id="orcidWorkFactoryFieldMapping" class="org.dspace.app.orcid.model.OrcidWorkFieldMapping">
  <property name="contributorFields" value="${orcid.mapping.work.contributors}" />  
  <property name="externalIdentifierFields" value="${orcid.mapping.work.external-ids}" />  
  <property name="publicationDateField" value="${orcid.mapping.work.publication-date}" />  
  <property name="titleField" value="${orcid.mapping.work.title}" />  
  <property name="journalTitleField" value="${orcid.mapping.work.journal-title}" />  
  <property name="shortDescriptionField" value="${orcid.mapping.work.short-description}" />  
  <property name="subTitleField" value="${orcid.mapping.work.sub-title}" />  
  <property name="languageField" value="${orcid.mapping.work.language}" />  
  <property name="languageConverter" ref="${orcid.mapping.work.language.converter}" />  
  <property name="typeField" value="${orcid.mapping.work.type}" />  
  <property name="typeConverter" ref="${orcid.mapping.work.type.converter}" />  
  <property name="citationType" value="${orcid.mapping.work.citation.type}" />  
</bean>
```

that reads the mapping from the `config/modules/orcid.cfg` file:

```ini
### Work (Publication) mapping ###
orcid.mapping.work.title = dc.title
orcid.mapping.work.sub-title =
orcid.mapping.work.short-description = dc.description.abstract
orcid.mapping.work.publication-date = dc.date.issued
orcid.mapping.work.language = dc.language.iso
orcid.mapping.work.language.converter = mapConverterDSpaceToOrcidLanguageCode
orcid.mapping.work.journal-title = dc.relation.ispartof
orcid.mapping.work.type = dc.type
orcid.mapping.work.type.converter = mapConverterDSpaceToOrcidPublicationType

##orcid.mapping.work.contributors syntax is <metadatafield>::<role>
orcid.mapping.work.contributors = dc.contributor.author::author
orcid.mapping.work.contributors = dc.contributor.editor::editor

##orcid.mapping.work.external-ids syntax is <metadatafield>::<type> or $simple-handle::<type>
The full list of available external identifiers is available here https://pub.orcid.org/v3.0/identifiers
orcid.mapping.work.external-ids = dc.identifier.doi::doi
orcid.mapping.work.external-ids = dc.identifier.scopus::eid
orcid.mapping.work.external-ids = dc.identifier.pmid::pmid
orcid.mapping.work.external-ids = $simple-handle::handle
orcid.mapping.work.external-ids = dc.identifier.isi::wosuid
orcid.mapping.work.external-ids = dc.identifier.issn::issn
```

In the above configuration the "simple" properties are mapped matching the ORCID field name on the left (i.e. short-description) with the DSpace metadata that holds such information (i.e dc.description.abstract). For the ORCID Type field a special "converter" is configured so that the value of the DSpace metadata (i.e. dc.type) is mapped to the controlled-list of types accepted by ORCID (https://info.orcid.org/faq/what-work-types-does-orcid-support/). The value of the `orcid.mapping.work.type.converter` matches the name of a bean defined in the `config/spring/api/orcid-services.xml`:

```xml
<bean name="mapConverterDSpaceToOrcidPublicationType" class="org.dspace.util.SimpleMapConverter" init-method="init">
  <property name="converterNameFile" value="orcid/mapConverter-dspace-to-orcid-publication-type.properties" />  
  <property name="configurationService" ref="org.dspace.services.ConfigurationService" />  
  <property name="defaultValue" value="other" />
</bean>
```

Finally a special treatment is needed for the external ids as this is a complex field on the ORCID side composed of two values: the identifier type (from a controlled-list) and the identifier value. In this case the configuration maps a DSpace metadata field (i.e. dc.identifier.doi) to a specific identifier type (i.e. the part after ::, doi).

**Mapping of DSpace Project items to ORCID Funding**

A DSpace "Project" item is pushed to ORCID as a "Funding" using the `org.dspace.orcid.model.factory.impl.OrcidFundingFactory` configured via this mapping bean:

```xml
<bean id="orcidFundingFactoryFieldMapping" class="org.dspace.app.orcid.model.OrcidFundingFieldMapping">
  <property name="contributorFields" value="${orcid.mapping.funding.contributors}" />  
  <property name="publicationDateField" value="${orcid.mapping.funding.publication-date}" />  
  <property name="titleField" value="${orcid.mapping.funding.title}" />  
  <property name="journalTitleField" value="${orcid.mapping.funding.journal-title}" />  
  <property name="shortDescriptionField" value="${orcid.mapping.funding.short-description}" />  
  <property name="subTitleField" value="${orcid.mapping.funding.sub-title}" />  
  <property name="languageField" value="${orcid.mapping.funding.language}" />  
  <property name="languageConverter" ref="${orcid.mapping.funding.language.converter}" />  
  <property name="typeField" value="${orcid.mapping.funding.type}" />  
  <property name="typeConverter" ref="${orcid.mapping.funding.type.converter}" />  
  <property name="citationType" value="${orcid.mapping.funding.citation.type}" />
</bean>
```
that reads the mapping from the `config/modules/orcid.cfg` file

### Funding mapping ###

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Mapping Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>orcid.mapping.funding.title</td>
<td>dc.title</td>
</tr>
<tr>
<td>orcid.mapping.funding.type</td>
<td></td>
</tr>
<tr>
<td>orcid.mapping.funding.type.converter</td>
<td>mapConverterDSpaceToOrcidFundingType</td>
</tr>
<tr>
<td>orcid.mapping.funding.external-ids syntax is</td>
<td>&lt;metadatafield&gt;::&lt;type&gt;</td>
</tr>
<tr>
<td>orcid.mapping.funding.description</td>
<td>dc.description</td>
</tr>
<tr>
<td>orcid.mapping.funding.start-date</td>
<td>project.startDate</td>
</tr>
<tr>
<td>orcid.mapping.funding.end-date</td>
<td>project.endDate</td>
</tr>
<tr>
<td>orcid.mapping.funding.contributors syntax is</td>
<td>&lt;metadatafield&gt;::&lt;type&gt;</td>
</tr>
<tr>
<td>orcid.mapping.funding.organization-relationship-type</td>
<td>isOrgUnitOfProject</td>
</tr>
<tr>
<td>orcid.mapping.funding.amount</td>
<td>project.amount</td>
</tr>
<tr>
<td>orcid.mapping.funding.amount.currency</td>
<td>project.amount.currency</td>
</tr>
<tr>
<td>orcid.mapping.funding.amount.currency.converter</td>
<td>mapConverterDSpaceToOrcidAmountCurrency</td>
</tr>
</tbody>
</table>

in the above configuration the "simple" properties are mapped matching the ORCID field name on the left (i.e. description) with the DSpace metadatafield that holds such information (i.e dc.description). For the ORCID Type field a special "converter" is configured so that the value of the DSpace metadata (i.e. dc.type) is mapped to the controlled-list of types accepted by ORCID ([https://support.orcid.org/hc/en-us/articles/360006894674-Metadata-in-the-Funding-section](https://support.orcid.org/hc/en-us/articles/360006894674-Metadata-in-the-Funding-section)). The value of the `orcid.mapping.funding.type.converter` matches the name of a bean defined in the `config/spring/api/orcid-services.xml` file.

The same apply for the `currency` field:

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Mapping Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>orcid.mapping.funding.amount.currency.converter</td>
<td>mapConverterDSpaceToOrcidAmountCurrency</td>
</tr>
</tbody>
</table>

Finally a special treatment is needed for Funder that is a mandatory field on the ORCID side. In this case the mapping defines which relation is used to link the Project with the Funder (OrgUnit)

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Mapping Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>orcid.mapping.funding.organization-relationship-type</td>
<td>isOrgUnitOfProject</td>
</tr>
</tbody>
</table>

Configure the import features
The Import features from ORCID have been implemented using the Live Import Framework.

The following bean is used to configure the import of person records from ORCID. It is activated as an external source in config/spring/api/external-services.xml:

```xml
<bean class="org.dspace.external.provider.impl.OrcidV3AuthorDataProvider" init-method="init">
   <property name="sourceIdentifier" value="orcid"/>
   <property name="orcidUrl" value="${orcid.domain-url}"/>
   <property name="clientId" value="${orcid.application-client-id}"/>
   <property name="clientSecret" value="${orcid.application-client-secret}"/>
   <property name="OAUTHUrl" value="${orcid.token-url}"/>
   <property name="orcidRestConnector" ref="orcidRestConnector"/>
   <property name="supportedEntityTypes">
      <list>
         <value>Person</value>
      </list>
   </property>
</bean>
```

The mapping between ORCID Person and the DSpace Person Item is the following, currently hard-coded:

<table>
<thead>
<tr>
<th>ORCID</th>
<th>DSpace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name/FamilyName</td>
<td>person.firstName</td>
</tr>
<tr>
<td>Name/GivenName</td>
<td>person.givenName</td>
</tr>
<tr>
<td>Name/Path</td>
<td>person.identifier.orcid</td>
</tr>
<tr>
<td>ORCID Profile URL</td>
<td>dc.identifier.uri</td>
</tr>
</tbody>
</table>

The following bean is instead used to configure the import of publication records from ORCID (Work):

```xml
<bean id="orcidPublicationDataProvider" class="org.dspace.external.provider.impl.OrcidPublicationDataProvider">
   <property name="sourceIdentifier" value="orcidWorks"/>
   <property name="fieldMapping" ref="orcidPublicationDataProviderFieldMapping"/>
   <property name="supportedEntityTypes">
      <list>
         <value>Publication</value>
      </list>
   </property>
</bean>
```

The mapping of the ORCID Work metadata to the DSpace metadata is performed by the following bean in config/spring/api/orcid-services.xml:
that reads the mapping from the `config/modules/orcid.cfg` file.

Please note that such mapping is separated from the mapping used to push information from DSpace to ORCID but usually, as provided in the default configuration, the mapping should be the same.

---

### Work (Publication) external-data.mapping ###

orcid.external-data.mapping.publication.title = dc.title

orcid.external-data.mapping.publication.description = dc.description.abstract

orcid.external-data.mapping.publication.issued-date = dc.date.issued

orcid.external-data.mapping.publication.language = dc.language.iso

orcid.external-data.mapping.publication.language.converter = mapConverterOrcidToDSpaceLanguageCode

orcid.external-data.mapping.publication.is-part-of = dc.relation.ispartof

orcid.external-data.mapping.publication.type = dc.type

orcid.external-data.mapping.publication.type.converter = mapConverterOrcidToDSpacePublicationType

---

I'm having trouble testing the ORCID integration. What should I check?
Please double check the documentation and the other FAQs to be sure that you have followed all of the instructions to enable the integration correctly. If you still have trouble, contact the DSpace tech community via email or slack providing as much detail as possible. If the issue is related to the synchronization of DSpace local data with ORCID it would be useful to share information about the content of your orcidhistory table and any relevant message that you could have in the dspace.log file.

I cannot find the ORCID features described by this page in my installation

The ORCID features must be enabled by changing some configuration files. Please refer to the Enable the integration section above.

I’m unable to authenticate via ORCID

If you have correctly enabled the ORCID authentication feature and you are able to start the OAuth flow with ORCID but get a failure when you are redirected back to DSpace, it could be due to privacy settings on your ORCID record. The DSpace ORCID authentication requires that you release an email address to match your ORCID account with a DSpace account or to create a new one at your first login. Make your ORCID account email address public or visible to trusted parties. This is often not the case for a freshly created account on ORCID.

If you are encountering this issue, you’ll see a message like this in your “dspace.log” file on the backend:

```
2022-08-04 11:43:42,124 ERROR unknown unknown org.dspace.authenticate.OrcidAuthenticationBean @ An error occurs registering a new EPerson from ORCID
java.lang.IllegalStateException: The email is configured private on orcid
```

I’m having trouble creating test accounts on ORCID to experiment with the features

Please refer to the ORCID trouble-shooting guide https://info.orcid.org/documentation/integration-guide/troubleshooting/ A frequent mistake working with the ORCID sandbox environment is to forget that only email addresses @mailinator.com are allowed for account created on the sandbox. Remember to validate your email address once the account as been created visiting the online inbox at mailinator.com

I have configured my Public ORCID API credentials in DSpace but I get an error attempting to login via ORCID

When you use public ORCID API credentials you can only use a subset of the integration features (check). Moreover you need to limit the scopes (permissions) requested to the user via the ORCID authentication to the /authenticate scope. Please check the Enable the integration section above.

I don’t find my publications looking up for my ORCID iD

Please check "config/modules/orcid.cfg" (or your local.cfg) to see if the system has been properly configured to use the production ORCID API. There is a chance that your installation is still configured to use the ORCID Sandbox that is appropriate for the testing and development phase of the integration. The ORCID sandbox doesn’t contain the same data as the Public environment.

I cannot push all my publications, only few or none of them are listed in the queue

Please double check that the orcidqueue consumer has been enabled (in dspace.cfg or local.cfg) and that the orcid settings of your profile have the “All publications” checkbox flagged. ORCID features require the use of the new Configurable Entities. Only Publication item are synchronized with ORCID; simple “untyped” items will not be synchronized. Please consider to convert your legacy collection to “Publication” collection and set a dspace.entity.type = Publication metadata on your legacy items.

Push of publications to ORCID fails

This is usually due to validation errors. ORCID could complain about missing mandatory fields or invalid values for fields that are linked to a controlled-list. Please check the table in the Configure the push of information from DSpace to ORCID and the Mapping of DSpace Publication items to ORCID Funding paragraph to solve this. Your dspace.log file may also provide useful error messages.

Push of projects to ORCID fails

This is usually due to validation errors. Make sure that all required metadata fields exist on the Project Entity and any linked OrgUnit Entities. ORCID could complain about missing mandatory fields or invalid values for fields that are linked to a controlled-list. Please check the table in the Configure the push of information from DSpace to ORCID and the Mapping of DSpace Project items to ORCID Funding paragraph to solve this. Your dspace.log file may also provide useful error messages.