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PART THREE: Use your ORCID profile to link with Scopus, Australian National Data Service, etc. (p. 21–22)

28th January 2014: this is an updated version of the guide sent out on 29th November 2013. It has more detailed instructions about uploading publications from EndNote to ResearcherID (p. 8–9).

PART ONE: Finalise your ResearcherID account and import publications

Setting up your account

CDU Library will:

- contact you when your new ResearcherID account is initiated
- provide you with a temporary password.

If you are one of the few CDU staff who already have a ResearcherID account, please check that your profile is up to date and correct [e.g. make sure the institution name you use is Charles Darwin University (CDU) or Menzies School of Health Research (MSHR)] and proceed to PART TWO.

You must log into ResearcherID to complete the registration of your account.

(1) On the ResearcherID website, click on Login:

[ResearcherID website screenshot]
(2) Enter the username (CDU email address) and the temporary password sent to you by CDU Library. Click on Login.
(3) Complete the remaining items on the registration page and change your password.

Please do NOT change the given email address.

Please do NOT change institution: it will either be Charles Darwin University (CDU) or Menzies School of Health Research (MSHR).

Choose a new password and security question.
(4) Click on Submit Registration

(5) After you read and accept the end-user licence agreement, you will be given your ResearcherID profile number and can begin to access your account.
(6) When you click on login to ResearcherID, you will be asked if you want to associate your ORCID account with your ResearcherID account. While this is ultimately what we would like you to do, at this stage, please select the Remind Me Later button. It is better to import all your publications into ResearcherID first and then later create an ORCID profile and link the two.
Adding publications to your ResearcherID profile

(1) On your profile page click Add Publications.
(2) You will be presented with three options: start with Search Web of Knowledge

(3) Search for and select your publications and click Add and then Return to My Researcher Profile. All your publications indexed by Web of Science should now be associated with your ResearcherID profile.
(4) To add further publications, as before, click on the Add Publications button and you will again be presented with the three options.

**Adding references from EndNote to a ResearcherID profile**

The best way to add publications from your desktop EndNote library to your ResearcherID profile is through EndNote online. **EndNote online acts as the intermediary.** EndNote online is the EndNote version of your ResearcherID profile.

**Follow these steps:**

a) Log into your ResearcherID profile and go to “Add Publications”

b) Choose Option 2: EndNote; Go to EndNote

c) This will take you into your EndNote online account (you shouldn’t have to log in again; if you do, the login details are the same as for your ResearcherID profile)

d) Now open your desktop EndNote library (version X7)

e) Save a back-up copy of your library. File; Compressed Library (.enlx). This is just in case the transfer process goes wrong

f) To transfer publications from your desktop EndNote library to your online EndNote library and vice versa, you will now sync the two libraries by either going to Tools; Sync or using the shortcut button highlighted below

g) All your desktop EndNote publications should now be listed in your online EndNote library under “All My References”. The number of publications is in parentheses
h) When you open the “All My References” list, you can select the publications that you want to associate with your ResearcherID profile by ticking the adjacent boxes

i) Once you’ve selected your publications, go to the “Add to group ...” box highlighted above and choose the “My Publications” option under “ResearcherID”.

[If you have general EndNote queries, please contact Jayshree Mamtora, Research Services Coordinator in the Office of Library Services (jayshree.mamtora@cdu.edu.au).

(5) You can use your ResearcherID profile to:

- view your publication citation metrics
- look at your collaboration and citing articles networks
- link to ORCID (see PART TWO).

If you search the Web of Science using your ResearcherID number as a search term, you can perform a more complex analysis of your publications and articles that cite your publications.

Your ResearcherID profile is not updated automatically. You may find it useful to set up a Search Alert on the Web of Science so that every time one of your publications is added, you will be notified in an email. To set up a Search Alert, click on the Search History tab after doing an author search for your publications.

To understand how you can assemble citation metrics for research groups, read through UQ’s resource: Citation metrics for research groups.
To change your ResearcherID details and manage your privacy settings, click on Manage Profile.
PART TWO: Link your ResearcherID account with an ORCID profile

(1) On your ResearcherID My Researcher Profile page, click on the link to ORCID.

(2) Choose I would like to create an ORCID record and click Continue.

You can watch or download Thomson Reuters’ four minute tutorial explaining ResearcherID’s integration with ORCID. Alternatively, keep working through this guide.
(3) When you register, make sure your ORCID privacy setting is set to public. Any other setting will prevent ResearcherID from being able to see any publications in your ORCID profile.
(4) Once you have logged into ORCID, you’ll need to authorise data exchange between the two systems. This message from ORCID appears every time you exchange data between accounts. Clicking the Authorize button will return you to ResearcherID.

(5) You’ll be directed here where you can decide what pieces of information to share with ORCID or choose to return to your profile. If you go back to your profile, you can come back to this screen at any time by using the ORCID data exchange button.
(6) If you’d like to exchange profile data between the two systems, click Go and authorise the action in ORCID.
(7) This will open a screen where you can overwrite your ResearcherID profile with information from ORCID, or vice versa. For example, if you choose to update your ResearcherID profile with the name you’ve used in ORCID, the system will change your name in the ResearcherID system. The same is true if you send information in the opposite direction.
(8) If you want to send publications currently in your ResearcherID profile to ORCID, click the link and this will open your ResearcherID publications list. Mark the papers you want to send to ORCID (up to 100 at a time). Once you press send, ORCID will ask you to authorise the process, and return you to ResearcherID when the transfer is complete.
(9) This will open a list where you can select which papers to transfer from ORCID before adding them. Once you've made your selections, the system will notify you that the transfer completed successfully.
(10) When transferring publications between ORCID and ResearcherID, keep in mind that BOTH systems currently allow duplicate papers to be imported into your profile. You can delete papers from either system.

To delete a paper from ResearcherID, click Manage List and select the paper or papers to delete and choose Delete Selected Publications.
When you transfer publication data between systems, be aware that ORCID does not currently track citations. **Times cited counts will not display in ORCID**, even for papers you have imported from ResearcherID. Moving the other direction, when you transfer data from ORCID to ResearcherID, **limited information** may transfer.
PART THREE: Use your ORCID profile to link with Scopus, Australian National Data Service, etc.

1) Log into your ORCID profile and choose Import Works.

2) You will be presented with a number of options that will use your ORCID profile data to search for publications or data sets in other databases, for example Scopus, the Australian National Data Service (ANDS) Registry, ResearcherID.

It is a very quick and easy process to import data from these data sources to your ORCID profile. By doing this you are using ORCID to link these otherwise disparate data sources.

ORCID was only launched 12 months ago; there is huge international optimism that with time, it will tie all ID systems together.

ORCID is developing several exciting integrations, for example third party tools such as ImpactStory that use your ORCID number to obtain usage metrics for your publications.
3) You now have both a ResearcherID and an ORCID profile. By keeping them up to date you will begin to see the benefits of more streamlined data flows.

To increase your visibility, insert your profiles in your email signature, on your CV, your uni webpage, so that with just one click, people can easily see the full breadth of your research activities.