

**MICROCREDS & ORCID TRAINING  
WEBINAR**

**31ST JULY 2023**

**DR CATHERINE FERRIS, IRISH ORCID  
CONSORTIUM LEAD**

The logo consists of a bright pink square with the words "MICRO" and "CREDITS" stacked vertically in white, bold, uppercase, sans-serif font.

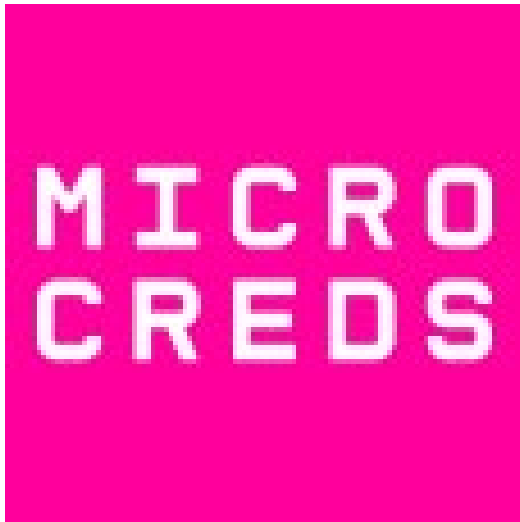
**MICRO  
CREDITS**



**HOUSEKEEPING:**

**- TODAY'S SESSION WILL BE RECORDED  
AND SHARED PUBLICLY AFTERWARDS**

**- IF YOU HAVE ANY QUESTIONS, PLEASE  
ADD THEM IN THE Q&A DURING THE  
COURSE OF THE WEBINAR, AND I'LL  
ANSWER THEM AT THE END**



## **TODAYS AGENDA:**

### **1. INTRODUCTION:**

- TO TODAY'S WEBINAR**
- TO MICROCREDS**
- TO ORCID**
- TO THE ORCID AFFILIATION MANAGER**

### **2. ORCID AFFILIATION MANAGER:**

- CONSIDERATIONS BEFORE USING**
- WORKFLOW**
- STEP BY STEP GUIDE**

The logo for MICROCREDS, featuring the words "MICRO" and "CREDS" stacked vertically in a white, bold, sans-serif font, centered within a solid magenta square.

**MICRO  
CREDS**



**TODAY'S TRAINING IS FOR  
ORGANISATION ADMINISTRATORS  
WHO WOULD LIKE TO PUBLICLY  
ACKNOWLEDGE COMPLETION OF A  
MICROCREDS COURSE, ON AN  
INDIVIDUALS ORCID RECORD, WITHIN  
PUBLIC OPEN SCHOLARLY METADATA**

The logo consists of a solid magenta square. Inside the square, the words "MICRO" and "CREDITS" are stacked vertically in a white, bold, sans-serif font. The letters are spaced out, with significant gaps between them.

**MICRO  
CREDITS**



**THE CONTENT OF THIS TRAINING IS  
ALSO RELEVANT TO ANY  
ORGANISATION THAT OFFERS  
QUALIFICATIONS OR CONTINUING  
PROFESSIONAL DEVELOPMENT (CPD)  
COURSES**



**TO NOTE: ONLY COURSES COMPLETED  
AT YOUR ORGANISATION MAY BE  
WRITTEN BY YOUR ORGANISATION TO  
ORCID RECORDS**



**MICRO  
CREDS**

# **WHAT IS THE MICROCREDS PROJECT?**

- MicroCreds is a 5-year project led by the Irish Universities Association and is part of the National Framework for quality assured and accredited micro-credentials.
- The project was launched on 12<sup>th</sup> July 2023 by the Minister for Further and Higher Education, Research, Innovation and Science Simon Harris and Minister for Enterprise, Trade and Employment Simon Coveney.
- The project aim is to address the barriers to participation in lifelong learning, including time constraints for learners and inflexibility in current programme provision and delivery. The flexibility in micro-credentials means that learners can access learning in discrete small units, at a time and pace which allows greater balance with both life and work commitments.

[www.microcreds.ie](http://www.microcreds.ie)

<https://www.gov.ie/en/press-release/e25fb-ministers-harris-and-coveney-launch-microcredsie-platform-to-boost-upskilling-and-reskilling-in-ireland/?referrer=http://www.gov.ie/en/press-release/bc970-ministers-harris-and-coveney-launch-microcredsie-platform-to-boost-upskilling-and-reskilling-in-ireland/>

The logo for MicroCreds, featuring the words "MICRO" and "CREDS" stacked vertically in a white, bold, sans-serif font, centered within a bright pink square.

# MICRO CREDS

## WHAT ARE MICROCREDS?

- Microcredentials are bite-sized accredited courses to upskill, reskill, or develop a new skill.
- Microcredentials are offered online, face-to-face, or as blended learning, in short flexible courses, designed to work around existing commitments.
- Microcredentials can be taken as stand-alone courses, or stacked into larger qualifications over time.
- Microcredentials are currently offered by Dublin City University, Maynooth University, Trinity College Dublin, University College Cork, University of Galway, University College Dublin and University of Limerick.





# WHAT IS ORCID?

- ORCID IDs are free unique persistent identifiers to distinguish researchers (defined in the broadest sense of the word), to help them claim credit for their activities - and disambiguating if they have the same (or similar) name to others, or if they change name throughout their career, or if they have used different versions of their name throughout their career.
- As DOIs are persistent identifiers for research outputs, ORCID IDs are persistent identifiers for individuals.
- ORCID IDs look like this: <https://orcid.org/0000-0001-5727-2427>
- ORCID IDs are accompanied by ORCID records (metadata records) which give the alphanumeric string meaning, and include details on name, education, employment, qualifications, research outputs, funding received and professional activities.
- ORCID IDs are researcher centric: only the researcher themselves can set up an ORCID ID, the researcher sets the privacy settings of the ORCID record, and the researcher decides which other entities (“trusted parties”) can contribute data to their ORCID record.



# WHAT IS ORCID?

- ORCID is an open infrastructure, community governed, and supported by membership fees.
- ORCID records with visibility settings of “Everyone” are public open metadata which can be publicly viewed in the ORCID UI ([www.orcid.org](http://www.orcid.org)), and integrated and queried using APIs with any type of system.
- ORCID, Crossref, DataCite and UnPaywall are examples of scholarly open metadata which enable large-scale data analysis. Therefore, writing to ORCID records enables reporting and increases public visibility of uptake of your organisation’s courses.
- Your organisation taking responsibility for writing activity relating to your organisation to ORCID records ensures the data is correct, verified, and trustworthy when being used by other parties.
- The Irish ORCID Consortium is an outcome of Ireland’s National Open Research Forum and was established to support adoption of ORCID in Ireland. It is focused on developing and supporting system integrations, and the writing of authoritative metadata to ORCID records by RPOs, RFOs and publishers.

# MICROCREDS & ORCID: THE END RESULT



SIGN IN/REGISTER English

**iD**  
https://sandbox.orcid.org/  
0000-0001-5130-220X

Is this you? [Sign in to start editing](#)

Printable version

Name  
**Catherine Ferris**

Activities [Expand all](#)

> **Employment (1)** [Sort](#)

▼ **Education and qualifications (1)** [Sort](#)

<b>University of Limerick: Limerick, IE</b>
2023-11 to 2023-11   Aircraft Leasing (3 ECTS, Level 9 NFQ) (Kemmy Business School) <a href="#">Show more detail</a>
<b>Source:</b> IReL Member Portal Testing v/a ORCID Member Portal - Sandbox

> **Works (5)** [Sort](#)

# MICROCREDS & ORCID: THE END RESULT



SIGN IN/REGISTER English

Search...



[https://sandbox.orcid.org/  
0000-0001-5130-220X](https://sandbox.orcid.org/0000-0001-5130-220X)

Is this you? [Sign in to start editing](#)

Printable version

Name  
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Activities [Expand all](#)

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▼ **Education and qualifications (1)**

**University of Limerick: Limerick, IE**

2023-11 to 2023-11 | Aircraft Leasing (3 ECTS, Level 9 NFQ) (Kemmy Business School)  
Qualification [Show more detail](#)

Source: IReL Member Portal Testing via ORCID Member Portal - Sandbox

> **Works (5)**

This is a test account in the ORCID test environment (sandbox.orcid.org)

When your organisation writes qualification data, the name of your organisation will appear here

# THE ORCID AFFILIATION MANAGER: INTRODUCTION

<https://member-portal.orcid.org/>

Warning! <https://member-portal.sandbox.orcid.org> is a test environment for the ORCID Member Portal that connects to the ORCID Registry test environment <https://sandbox.orcid.org>

ORCID Member Portal | [Irish Research eLibrary](#) Tools Resources Admin Account

## Affiliations

[+ Add affiliation](#) [Import affiliations from CSV](#) [Request affiliations for edit](#) [Request affiliation status report](#) [Request permission links](#) [Send permission notifications](#)

Search...

User Email	ORCID iD	Affiliation Data	Date created	Status	
01testiadt@mailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6627">https://sandbox.orcid.org/0009-0001-6066-6627</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE  2023 <a href="#">View Details</a>	May 23, 2023, 1:49:31 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>
catherine.ferris@mailinator.com	<a href="https://sandbox.orcid.org/0000-0001-5130-220X">https://sandbox.orcid.org/0000-0001-5130-220X</a>	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 11:44:44 AM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>
hrbpeerreviewer01@mailinator.com	<a href="https://sandbox.orcid.org/0009-0005-4806-8973">https://sandbox.orcid.org/0009-0005-4806-8973</a>	SERVICE Health Research Board: Dublin, IE (Peer Reviewer) 2022 <a href="#">View Details</a>	May 5, 2023, 2:40:05 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>
hrbpeerreviewer02@mailinator.com		SERVICE Health Research Board: Dublin, IE (Peer Reviewer) 2022	May 5, 2023, 2:40:05 PM	Notification sent	<a href="#">Edit</a> <a href="#">Delete</a>

- Stand-alone system
- No system integrations required
- No technical support required.
- Access in the web browser
- Very easy to use

# THE ORCID AFFILIATION MANAGER: INTRODUCTION

<https://member-portal.orcid.org/>

Available to premium/consortium ORCID members only

- List of current Irish ORCID Consortium Members: <https://irel.ie/orcid-consortium/>
- To enquire about joining the Irish ORCID Consortium, contact [catherine.ferris@mu.ie](mailto:catherine.ferris@mu.ie)
- To enquire about becoming a consortium member in another country, or a premium member, contact [support@orcid.org](mailto:support@orcid.org)
- ORCID membership fees are listed here: <https://info.orcid.org/membership/>

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For existing consortium members:

- Each consortium member has a Main Administrative Contact, who is responsible for that organisation's compliance with the ORCID membership agreement. Also, many member organisations have existing, or in development, organisation-wide ORCID strategies. At your organisation, approval and access to use the ORCID Affiliation Manager for the purpose of MicroCreds/qualifications/CPD will need to be sought from that Main Administrative Contact. If you don't know who that is at your organisation, please contact [catherine.ferris@mu.ie](mailto:catherine.ferris@mu.ie) (for Ireland) or [support@orcid.org](mailto:support@orcid.org) (everywhere else).

# THE ORCID AFFILIATION MANAGER: CONSIDERATIONS BEFORE USING

<https://member-portal.orcid.org/>

- Identify who at your organisation will use the ORCID Affiliation Manager (different staff for different courses? One admin for all courses?)
- Affiliations written to ORCID records must be based on internal authoritative sources. Identify what that means at your organisation (course records?)
- Do the administrators who will use the ORCID Affiliation Manager have access to those sources?
- If not, establish inter-departmental commitments and workflows to obtain internal authoritative source in an ongoing, sustainable way
- Although the facility is open to you to write qualification records for in-progress courses, consider only writing the qualification record when the course is completed. Writing on completion means it's a one-time action for the administrator and removes the requirement to maintain/update the ORCID record. This advice does not apply to all affiliations written through the ORCID Affiliation Manager, but makes sense for short courses.
- Identify how often ORCID will be updated (i.e. will you support real-time reporting, on course completion?) + inform the Irish ORCID Consortium Lead (Ireland) or ORCID Support (everywhere else)
- NB: the ORCID Affiliation Manager is part of the ORCID Member Portal – all users with access for reporting at your organisation will have access to the Affiliation Manager (and vice versa)
- All users at your organisation will be able to add/view/edit all affiliations listed on your organisation's Affiliation Manager (this is not a dashboard/per/user, but a dashboard/per/org).

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# THE ORCID AFFILIATION MANAGER: INTERDEPARTMENTAL AGREEMENT TEMPLATE

[https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine\\_ferris\\_mu\\_ie/EfHh2UqaU7tPm7MIQ9sqbzoB4s005231ynhC4\\_WEUQdmBQ?e=2WE42w](https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine_ferris_mu_ie/EfHh2UqaU7tPm7MIQ9sqbzoB4s005231ynhC4_WEUQdmBQ?e=2WE42w)

## ORCID AFFILIATION MANAGER INTERDEPARTMENTAL AGREEMENT

Date	
Organisation	
Organisation ROR	
Organisation's Main Administrative Contact for Irish ORCID Consortium Membership	
Department	
Head of Department	
Department's ORCID Affiliation Manager Administrator(s)	Email: First name: Last name:
Authorised Scope of Use of the ORCID Affiliation Manager by Department	
Department's Timeline for Updating Records	

For the Department's use of the ORCID Affiliation Manager, the Organisation's Main Administrative Contact commits to:

# THE ORCID AFFILIATION MANAGER: INTERDEPARTMENTAL AGREEMENT TEMPLATE

[https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine\\_ferris\\_mu\\_ie/EfHh2UqaU7tPm7MIQ9sqbzoB4s005231ynhC4\\_WEUQdmBQ?e=2WE42w](https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine_ferris_mu_ie/EfHh2UqaU7tPm7MIQ9sqbzoB4s005231ynhC4_WEUQdmBQ?e=2WE42w)

Department's timeline for updating records

For the Department's use of the ORCID Affiliation Manager, the Organisation's Main Administrative Contact commits to:

- Provide a copy of Irish ORCID Consortium Agreement to the Department
- Inform Department of any changes to Irish ORCID Consortium Agreement
- Define the above Authorised Scope of Use of the ORCID Affiliation Manager by Department
- Provide access for the Department Administrator(s) to the ORCID Affiliation Manager
- Update Department Administrator access to the ORCID Affiliation Manager, as required
- Provide Department Administrator(s) with training documentation for the ORCID Affiliation Manager
- Provide Department Administrator(s) with instructions for joining the Irish ORCID Consortium Community Forum, to receive updates on ORCID Affiliation Manager functionality
- Initiate direct support by Irish ORCID Consortium Lead for Department Administrator(s)
- Update the Irish ORCID Consortium Community of Practice Contacts spreadsheet with details of the Department's use of the Affiliation Manager.

# THE ORCID AFFILIATION MANAGER: INTERDEPARTMENTAL AGREEMENT TEMPLATE

[https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine\\_ferris\\_mu\\_ie/EfHh2UqaU7tPm7MIQ9sqbzob4s005231ynhC4\\_WEUQdmBQ?e=2WE42w](https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine_ferris_mu_ie/EfHh2UqaU7tPm7MIQ9sqbzob4s005231ynhC4_WEUQdmBQ?e=2WE42w)

For the Department's use of the ORCID Affiliation Manager, the Department commits to:

- Comply with the Irish ORCID Consortium Agreement
- Follow ORCID's [documented procedures](#) for use of the ORCID Affiliation Manager
- Assign and resource Department Administrator(s) on a continued basis to support the Department's use of the ORCID Affiliation Manager
- Inform the Organisation's Main Administrative Contact of any changes of Department Administrator(s).
- Only write affiliations within the Authorised Scope of Use of the ORCID Affiliation Manager by Department, and obtain prior approval from the Main Administrative Contact if an updated Authorised Scope is required
- Ensure that any changes to affiliations are updated (as per Department's Timeline for Updating Records above)
  - o Ensure that affiliations are updated with end dates when the affiliation ceases (as per Department's Timeline for Updating Records above)
- Continue to write new affiliations (within the Authorised Scope of Use and as per the Department's Timeline for Updating Records above), to ensure that ORCID records reflect the Organisation's affiliations as comprehensively as possible
- Only write affiliations using the Organisation's ROR, acknowledging that the highest-level organisation PID is to be used and not a department-level PID
- Only write affiliations for which the Organisation is the single authoritative source, acknowledging that affiliations are only to be written to the Organisation, and not to other organisations
- Only write affiliations that contain start dates.
- Only write affiliations validated by internal authoritative source data
- Ensure that internal workflows are in place to notify the Department Administrator(s) of changes to the internal authoritative source data and provide access to updated data
- Ensure that copies of relevant internal authoritative source data are maintained, to enable current and future Department Administrators and Main Administrative Contacts to manage and validate affiliation records written to ORCID
- Stay informed of developments and/or changes in functionality to the ORCID Affiliation Manager which may impact the Department's usage of the system.

Both parties agree to promptly notify the other party in writing when the contact persons specified above change. Such notifications will be considered jointly accepted amendments to this Agreement.

Signed:

Signed: \_\_\_\_\_

# THE ORCID AFFILIATION MANAGER: INTERDEPARTMENTAL AGREEMENT TEMPLATE

[https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine\\_ferris\\_mu\\_ie/EfHh2UqaU7tPm7MIQ9sqbzoB4s005231ynhC4\\_WEUQdmBQ?e=2WE42w](https://maynoothuniversity-my.sharepoint.com/:w:/g/personal/catherine_ferris_mu_ie/EfHh2UqaU7tPm7MIQ9sqbzoB4s005231ynhC4_WEUQdmBQ?e=2WE42w)

Both parties agree to promptly notify the other party in writing when the contact persons specified above change. Such notifications will be considered jointly accepted amendments to this Agreement.

Signed: \_\_\_\_\_

Main Administrative Contact

Signed: \_\_\_\_\_

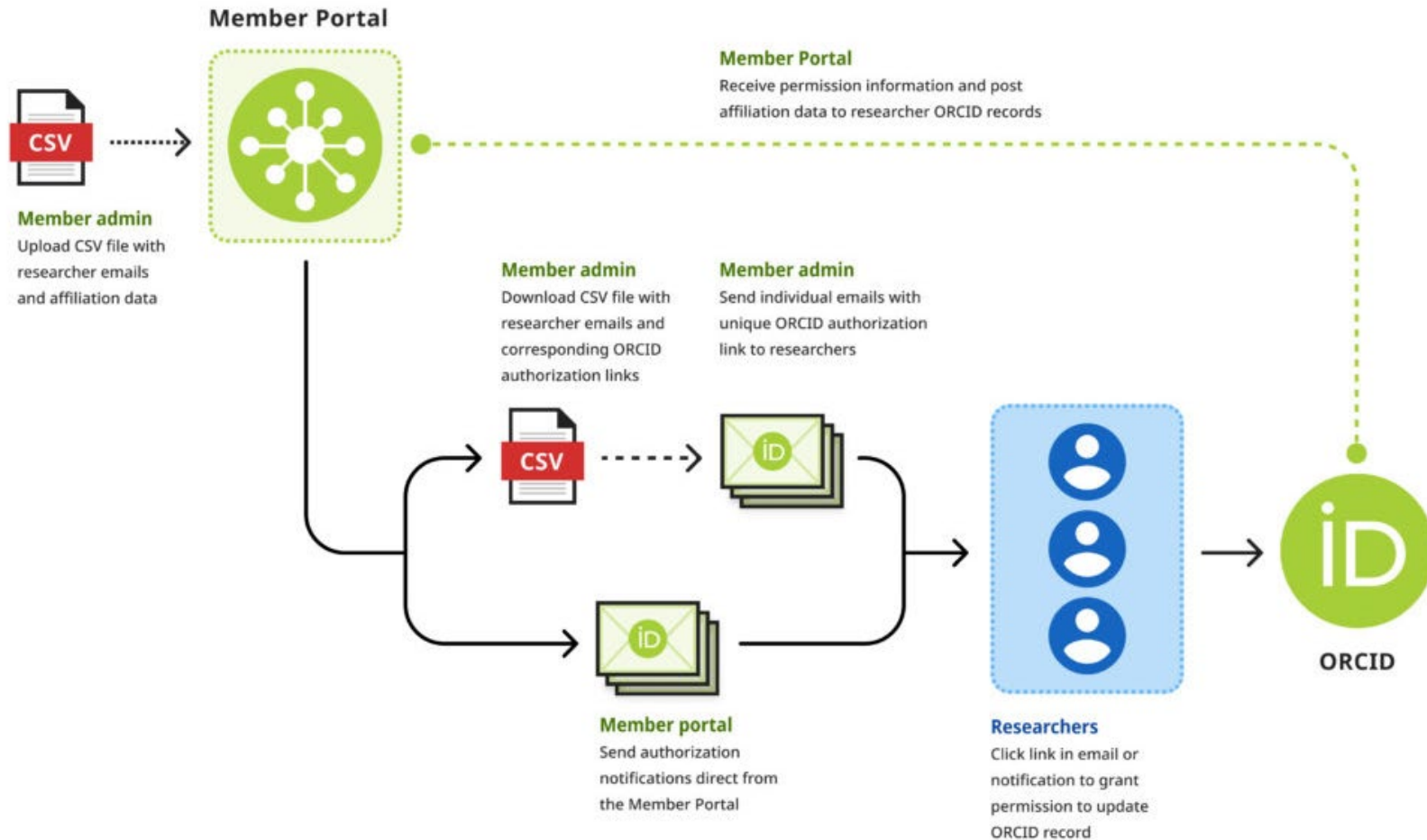
Head of Department

Date: \_\_\_\_\_

Date: \_\_\_\_\_

# THE ORCID AFFILIATION MANAGER: WORKFLOW

<https://info.orcid.org/documentation/member-portal/member-portal-affiliation-manager-guide/>





# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

Warning! <https://member-portal.sandbox.orcid.org> is a test environment for the ORCID Member Portal that connects to the ORCID Registry test environment <https://sandbox.orcid.org>

ORCID Member Portal | [Irish Research eLibrary](#)

[Tools](#) [Resources](#) [Admin](#) [Account](#)

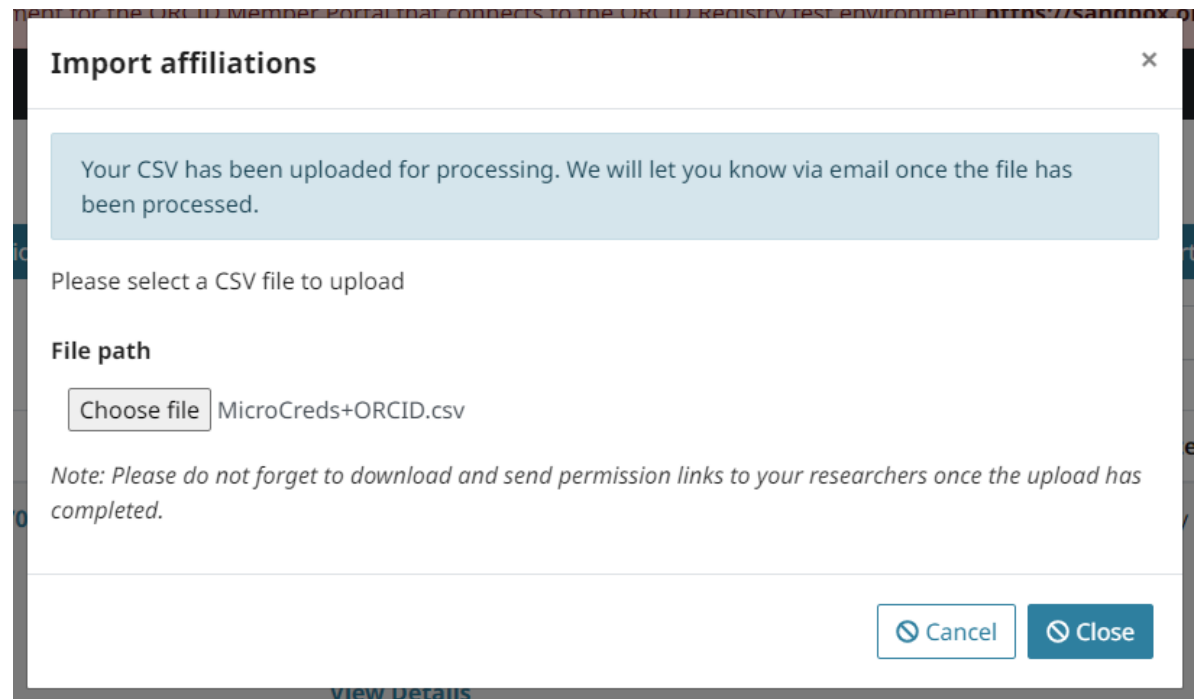
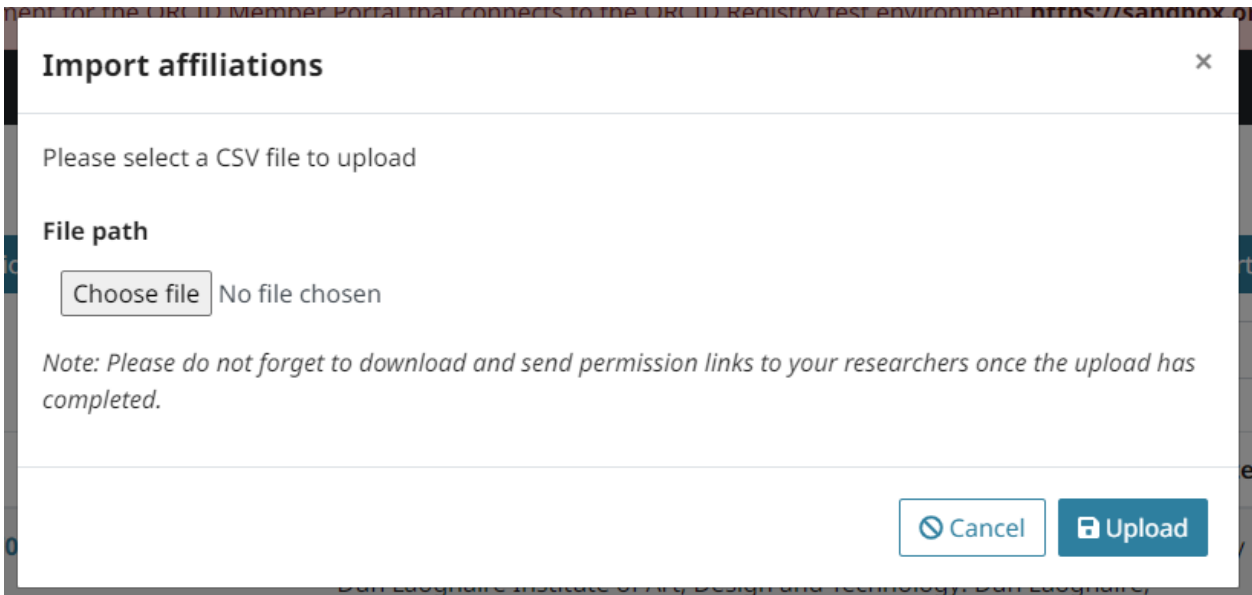
## Affiliations

[+ Add affiliation](#) [Import affiliations from CSV](#) [Request affiliations for edit](#) [Request affiliation status report](#) [Request permission links](#) [Send permission notifications](#)

Search...

User Email	ORCID ID	Affiliation Data	Date created	Status	
01testiadt@mailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6067">https://sandbox.orcid.org/0009-0001-6066-6067</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology; Dún Laoghaire, Dublin, IE  2023 <a href="#">View Details</a>	May 23, 2023, 1:49:31 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>
catherine.ferris@mailinator.com	<a href="https://sandbox.orcid.org/0000-0001-5130-220X">https://sandbox.orcid.org/0000-0001-5130-220X</a>	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 11:44:44 AM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>
hrbpeerreviewer01@mailinator.com	<a href="https://sandbox.orcid.org/0009-0005-4806-8973">https://sandbox.orcid.org/0009-0005-4806-8973</a>	SERVICE Health Research Board: Dublin, IE (Peer Reviewer) 2022 <a href="#">View Details</a>	May 5, 2023, 2:40:05 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>
hrbpeerreviewer02@mailinator.com		SERVICE Health Research Board: Dublin, IE (Peer Reviewer) 2022	May 5, 2023, 2:40:05 PM	Notification sent	<a href="#">Edit</a> <a href="#">Delete</a>

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE





# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

MS

Member Portal sandbox <info@member-portal.sandbox.orcid.org>

To: Catherine Ferris



Tue 25/07/2023 16:10

**WARNING**This email originated from outside of Maynooth University's Mail System. Do not reply, click links or open attachments unless you recognise the sender and know the content is safe.

## ORCID

The file MicroCreds+ORCID.csv that you uploaded at 7/25/23, 3:09 PM (UTC) has been processed.

The CSV upload was successfully processed with the following results:

- 5 affiliations added
- 0 affiliations updated
- 0 affiliations deleted
- 0 duplicate(s) ignored

Warm Regards,  
The ORCID Member Portal Team  
[membership@orcid.org](mailto:membership@orcid.org)

You have received this email as a service announcement related to your ORCID Member Portal account.

ORCID Member Portal | ORCID, Inc | 10411 Motor City Drive, Suite 750, Bethesda, MD 20817, USA | [orcid.org](https://orcid.org)

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

ultestresearcher20@mailinator.com	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:16 PM	Pending	<a href="#">Edit</a> <a href="#">Delete</a>
ultestresearcher22@mailinator.com	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:17 PM	Pending	<a href="#">Edit</a> <a href="#">Delete</a>
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ORCID Member Portal | Irish Research eLibrary

Tools Resources Admin Account

## Affiliations

+ Add affiliation Import affiliations from CSV Request affiliations for edit Request affiliation status report Request permission links Send permission notifications

Search...

User Email	ORCID ID	Affiliation Data	Date created	Status	
01testiadt@mailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6627">https://sandbox.orcid.org/0009-0001-6066-6627</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE  2023 <a href="#">View Details</a>	May 23, 2023, 1:49:31 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

## Affiliations

- [+ Add affiliation](#)
- [Import affiliations from CSV](#)
- [Request affiliations for edit](#)
- [Request affiliation status report](#)
- [Request permission links](#)
- [Send permission notifications](#)

Your permission links file will be mailed to you shortly. If you do not receive your file then please contact us at [membership@orcid.org](mailto:membership@orcid.org).

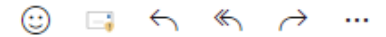
User Email	ORCID ID	Affiliation Data	Date created	Status	
01testiadt@mailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6627">https://sandbox.orcid.org/0009-0001-6066-6627</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE  2023 <a href="#">View Details</a>	May 23, 2023, 1:49:31 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE




Member Portal sandbox

To: Catherine Ferris



Tue 25/07/2023 16:14

 csv-report562547385648772...  
1 KB

**WARNING**This email originated from outside of Maynooth University's Mail System. Do not reply, click links or open attachments unless you recognise the sender and know the content is safe.



Please find attached your requested permission links file.

Warm Regards,  
The ORCID Member Portal Team  
[membership@orcid.org](mailto:membership@orcid.org)

You have received this email as a service announcement related to your ORCID Member Portal account.

ORCID Member Portal | ORCID, Inc | 10411 Motor City Drive, Suite 750, Bethesda, MD 20817, USA | [orcid.org](https://orcid.org)



# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

<https://info.orcid.org/affiliation-manager-email-guide>

mailmerge process\*

**NB: ensure you send the correct authorisation link to the correct email address!**

 *not shown*

## Affiliation Manager Email Guide

As described in the [Member portal organization admin guide](#), before you can add affiliation data to your researcher's ORCID records, your researchers first need to grant your organization permission to edit their record by clicking a customized link generated by the member portal.

Although the member portal generates permission links, your organization must email them to your researchers. Sending these emails from your organization's email domain (ideally) using your organization's branding provides advantages including:

- Increased likelihood that emails will be successfully delivered and opened
- Decreased likelihood that researchers will view emails as potential spam or phishing attempts
- Ability to fully customize the message and design according to your organization's needs and policies

### Permission email content guidelines

#### Required

- Brief explanation of the purpose of the message
- Permission link generated by the member portal, customized for each researcher (as identified by email address in the [CSV downloaded from the member portal](#))
- Steps needed to grant permission
- Brief explanation of what will happen after granting permission
- Point of contact within your organization for help or questions about your ORCID
- Link to additional information about ORCID
- Privacy policy statement/link explaining that your organization's privacy policy applies to affiliation data uploaded to the member portal. [ORCID's privacy policy](#) applies to data only after it is added to the ORCID Registry. In the case of



# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

ORCID Member Portal | Irish Research eLibrary Tools Resources Admin Account

## Affiliations

[+ Add affiliation](#) [Import affiliations from CSV](#) [Request affiliations for edit](#) [Request affiliation status report](#) [Request permission links](#) [Send permission notifications](#)

Search...

User Email	ORCID ID	Affiliation Data	Date created	Status	
01testiadt@mailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6627">https://sandbox.orcid.org/0009-0001-6066-6627</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE  2023 <a href="#">View Details</a>	May 23, 2023, 1:49:31 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

**MS** Member Portal sandbox  
To: Catherine Ferris

Thu 27/07/2023 09:12

**WARNING**This email originated from outside of Maynooth University's Mail System. Do not reply, click links or open attachments unless you recognise the sender and know the content is safe.

**ORCID**

---

Thank you for choosing to use the permission notification process.

We have sent the following to your researchers:

- 0 ORCID inbox notifications
- 5 emails


Warm Regards,  
The ORCID Member Portal Team  
[membership@orcid.org](mailto:membership@orcid.org)

You have received this email as a service announcement related to your ORCID Member Portal account.

ORCID Member Portal | ORCID, Inc | 10411 Motor City Drive, Suite 750, Bethesda, MD 20817, USA | [orcid.org](https://orcid.org)

[← Reply](#) [→ Forward](#)

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE



ultestresearcher20@mailinator.com	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:16 PM	Notification requested	<a href="#">Edit</a> <a href="#">Delete</a>
ultestresearcher22@mailinator.com	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:17 PM	Notification requested	<a href="#">Edit</a> <a href="#">Delete</a>
ultestresearcher33@mailinator.com	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:17 PM	Notification requested	<a href="#">Edit</a> <a href="#">Delete</a>
ultestresearcher44@mailinator.com	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:17 PM	Notification requested	<a href="#">Edit</a> <a href="#">Delete</a>
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# **THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE**

The administrator's process is complete!

# **THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE**

Detour: actions for the course participant

To ultestresearcher33  
From info@member-portal.sandbox.orcid.org  
Sending IP 69.72.47.199  
Received 2023-07-27 09:12:37

 Delete

[HTML](#) [JSON](#) [RAW](#) [LINKS](#) [SMTP\\_LOG](#) [ATTACHMENTS](#)



Hi

By allowing Irish Research eLibrary to add your research information to your ORCID record, you can spend more time conducting your research and less time managing it! We'll need your permission first though, so click on the link below to get started. You will get redirected to ORCID, after signing in, click on "authorize access" to allow Irish Research eLibrary to add information to your record.

[Grant Permission](#)

After granting permission, an affiliation entry will be added to your ORCID record. Please note that it may take up to 5 minutes for your ORCID record to be updated.

Why should I allow Irish Research eLibrary to update my ORCID record?

- When data in your ORCID record has been added by an organization you trust, you can be assured that it can be reused with a high degree of confidence in a number of different workflows, for example, when automatically filling out a growing number of manuscript submission or grant application forms.

What else should I know?


- Although Irish Research eLibrary will only add affiliation information to your ORCID record at this time, the permission you grant us now will allow us to add other information to your ORCID record (such as publications) in the future. We will notify you if we plan to do this.
- Researcher control is central to everything ORCID does. If you no longer want Irish Research eLibrary to edit your ORCID record, you can revoke permission at any time. See [Revoking Permission](#) for instructions.
- Affiliation information added to your ORCID record is subject to [ORCID's Privacy Policy](#). Per this policy, [you can control the visibility of this information in ORCID](#). The source data, however, is controlled by Irish Research eLibrary and is subject to their own privacy policy.

Warm Regards,  
The ORCID Member Portal Team  
[membership@orcid.org](mailto:membership@orcid.org)

You have received this email as a service announcement related to your ORCID Member Portal account.

[ORCID Member Portal](#) | ORCID, Inc | 10411 Motor City Drive, Suite 750, Bethesda, MD 20817, USA | [orcid.org](https://orcid.org)

To ultestresearcher33  
From info@member-portal.sandbox.orcid.org  
Sending IP 69.72.47.199  
Received 2023-07-27 09:12:37

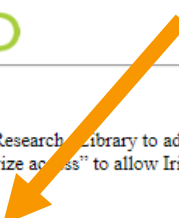
 Delete

HTML JSON RAW LINKS SMTP\_LOG ATTACHMENTS



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[Grant Permission](#)

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- Researcher control is central to everything ORCID does. If you no longer want Irish Research eLibrary to edit your ORCID record, you can revoke permission at any time. See [Revoking Permission](#) for instructions.
- Affiliation information added to your ORCID record is subject to [ORCID's Privacy Policy](#). Per this policy, [you can control the visibility of this information in ORCID](#). The source data, however, is controlled by Irish Research eLibrary and is subject to their own privacy policy.

Warm Regards,  
The ORCID Member Portal Team  
[membership@orcid.org](mailto:membership@orcid.org)

You have received this email as a service announcement related to your ORCID Member Portal account.

[ORCID Member Portal](#) | ORCID, Inc | 10411 Motor City Drive, Suite 750, Bethesda, MD 20817, USA | [orcid.org](https://orcid.org)

## Sign in

Email or 16-digit ORCID iD

example@email.com or 0000-0001-2345-6789

Password

**SIGN IN**

**Forgot your password or ORCID ID?**

Don't have an ORCID iD yet? [Register now](#)

or



**Access through your institution**



**Sign in with Google**



**Sign in with Facebook**



## Sign in

Email or 16-digit ORCID iD

example@email.com or 0000-0001-2345-6789

Password

**SIGN IN**

**Forgot your password or ORCID ID?**

Don't have an ORCID iD yet? [Register now](#)



or



**Access through your institution**



**Sign in with Google**



**Sign in with Facebook**

1

Personal data

2

Security and notifications

3

Visibility and terms

## Create your ORCID iD

This is step 1 of 3

Per ORCID's [terms of use](#), you may only register for an ORCID iD for yourself. Already have an ORCID iD? [Sign In](#)



Please enter your first/given name



[+ Add another email](#)

[GO BACK](#)

[NEXT](#)

1

Personal data

2

Security and notifications

3

Visibility and terms

## Create your ORCID iD

This is step 1 of 3

Per ORCID's [terms of use](#), you may only register for an ORCID iD for yourself. Already have an ORCID iD? [Sign In](#)

First name

Test



Last name (Optional)

Primary email

ultestresearcher33@mailinator.com

Confirm primary email

ultestresearcher33@mailinator.com

Additional email (Optional)



[+ Add another email](#)

[GO BACK](#)

[NEXT](#)

## Could this be you?

We found some accounts with your name, which means you may have already created an ORCID iD using a different email address. Before creating an account, please confirm that none of these records belong to you. Not sure if any of these are you? [Contact us](#).

First Name	Last Name	Affiliations	View Record
Test	Test	NASA, University of Nevada, Las Vegas	<a href="#">View Record</a>
Test		American Society for Nondestructive Testing, Cancer Services of New Mexico, King's College London, Kino Institute, Medical University of Vienna, Nicolae Testemițanu State University of Medicine and Pharmacy, University of London, fghfghf, liverpool	<a href="#">View Record</a>
Shawna Test	Sadler Test	Alberta Parks, Buckingham Palace, Calicut Zoo, University of CA	<a href="#">View Record</a>

[I ALREADY HAVE AN ID, GO BACK TO SIGN IN](#)

[NONE OF THESE ARE ME, CONTINUE WITH REGISTRATION](#)

and tips. To receive these emails, you will also need to verify



Personal data



Security and notifications



Visibility and terms

## Create your ORCID iD

This is step 2 of 3

Password



- 8 or more characters
- 1 letter or symbol
- 1 number

Confirm password

### 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 receive these emails, 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.

[GO BACK](#)

[NEXT](#)




## Create your ORCID iD

This is step 3 of 3

### 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 this content and who can see it.

By default, what visibility should be given to new items added to your ORCID Record?


-  **Everyone** (87% of users choose this)
-  **Trusted Organizations** (5% of users choose this)
-  **Only me** (8% of users choose this)

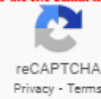
### More information on visibility settings

### Terms of Use

- I consent to the [privacy policy](#) and [terms of use](#) and agree to my data being publicly accessible where marked as "Visible to Everyone".
- I consent to my data being processed in the United States.  
[More information on how ORCID process your data.](#)

This reCAPTCHA is for testing purposes only. Please report to the site admin if you are seeing this.

 I'm not a robot



[GO BACK](#)

[REGISTER](#)

We recommend that you encourage setting the default visibility of ORCID records to "Everyone", so that this affiliation (and any information written by the [Trusted Parties](#) that are given permission to in the future) will be automatically accessible in ORCID's open public metadata, which is widely reused for research and reporting.



You are currently signed in as:


**Test**


<https://sandbox.orcid.org/0009-0006-2008-2009>


[Sign out](#)


**IREL Member Portal Testing** 

has asked for the following access to your ORCID record:

 Add/update other information about you (country, keywords, etc.)

 Add/update your research activities (works, affiliations, etc)

 Get your ORCID id

 Read your information with visibility set to Trusted Organizations

**Authorize access**

**Deny access**

If authorized, this organization will have access to your ORCID record, as outlined above and described in further detail in [ORCID's privacy policy](#).

You can manage access permissions for this and other Trusted Organizations in your [account settings](#).

You are currently signed in as:





**Test**

<https://sandbox.orcid.org/0009-0006-2008-2009>

[Sign out](#)

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has asked for the following access to your ORCID record:

-  Add/update other information about you (country, keywords, etc.)
-  Add/update your research activities (works, affiliations, etc)
-  Get your ORCID id
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If authorized, this organization will have access to your ORCID record, as outlined above and described in further detail in [ORCID's privacy policy](#).

You can manage access permissions for this and other Trusted Organizations in your [account settings](#).



## Thanks, Test

You have successfully granted Irish Research eLibrary permission to update your ORCID record, and your record will be updated with the affiliation information.

 <https://sandbox.orcid.org/0009-0006-2008-2009>


*If you find that data added to your ORCID record is incorrect, please contact Irish Research eLibrary*

Search...



[https://sandbox.orcid.org/  
0009-0006-2008-2009](https://sandbox.orcid.org/0009-0006-2008-2009)

 Is this you? [Sign in to start editing](#)

 Printable version


Name

**Test**

Activities

[Collapse all](#)


 **Education and qualifications (1)**

 Sort

**University of Limerick: Limerick, IE**

2023-11 to 2023-11 | Aircraft Leasing (3 ECTS, Level 9 NFQ) (Kemmy Business School)  
Qualification

[Show more detail](#)

**Source:**  IReL Member Portal Testing *via* ORCID Member Portal - Sandbox

*Record last modified Jul 27, 2023, 8:28:27 AM UTC*

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

Back to the administrator view...

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

ultestresearcher20@mailinator.com		QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:16 PM	Notification sent	<a href="#">Edit</a> <a href="#">Delete</a>
ultestresearcher22@mailinator.com		QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:17 PM	Notification sent	<a href="#">Edit</a> <a href="#">Delete</a>
ultestresearcher33@mailinator.com	<a href="https://sandbox.orcid.org/0009-0006-2008-2009">https://sandbox.orcid.org/0009-0006-2008-2009</a>	QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:17 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>
ultestresearcher44@mailinator.com		QUALIFICATION University of Limerick: Limerick, IE Kemmy Business School (Aircraft Leasing (3 ECTS, Level 9 NFQ)) 2023-11 to 2023-11 <a href="#">View Details</a>	Jul 25, 2023, 4:10:17 PM	Notification sent	<a href="#">Edit</a> <a href="#">Delete</a>
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# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

The screenshot shows the ORCID Member Portal for Irish Research eLibrary. The page title is "Affiliations". A navigation bar at the top contains "ORCID Member Portal | Irish Research eLibrary" and utility links for "Tools", "Resources", "Admin", and "Account". Below the title, there is a toolbar with buttons for "Add affiliation", "Import affiliations from CSV", "Request affiliations for edit", "Request affiliation status report", "Request permission links", and "Send permission notifications". A search bar is located below the toolbar. The main content area is a table with the following columns: "User Email", "ORCID ID", "Affiliation Data", "Date created", "Status", and "Actions". One affiliation is listed with the email "01testiad@tmailinator.com", ORCID ID "https://sandbox.orcid.org/0009-0001-6066-6627", and affiliation data "EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE 2023". The "Actions" column for this entry contains "Edit" and "Delete" buttons. Two orange arrows are overlaid on the image: one points to the "Add affiliation" button, and the other points to the "Edit" button.

ORCID Member Portal | Irish Research eLibrary

Tools Resources Admin Account

## Affiliations

+ Add affiliation Import affiliations from CSV Request affiliations for edit Request affiliation status report Request permission links Send permission notifications

Search...

User Email	ORCID ID	Affiliation Data	Date created	Status	Actions
01testiad@tmailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6627">https://sandbox.orcid.org/0009-0001-6066-6627</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE 2023	May 23, 2023, 1:49:31 PM	In ORCID	Edit Delete

# Add or edit affiliation

## User Email

## Affiliation Type

## Organization Name

## City

## State/Region

## Country

## Organization ID Source

## Organization ID

## Department

## Role/Title

## URL

## Start Year

## Start Month

## Start Day

## End Year

## End Month

## End Day

*Note: Please do not forget to download and send permission links to your researcher once the assertion has been saved.*

# Add or edit affiliation

## User Email

## Affiliation Type

## Organization Name

## City

## State/Region

## Country

## Organization ID Source

## Organization ID

## Department

## Role/Title

## URL

## Start Year

## Start Month

## Start Day

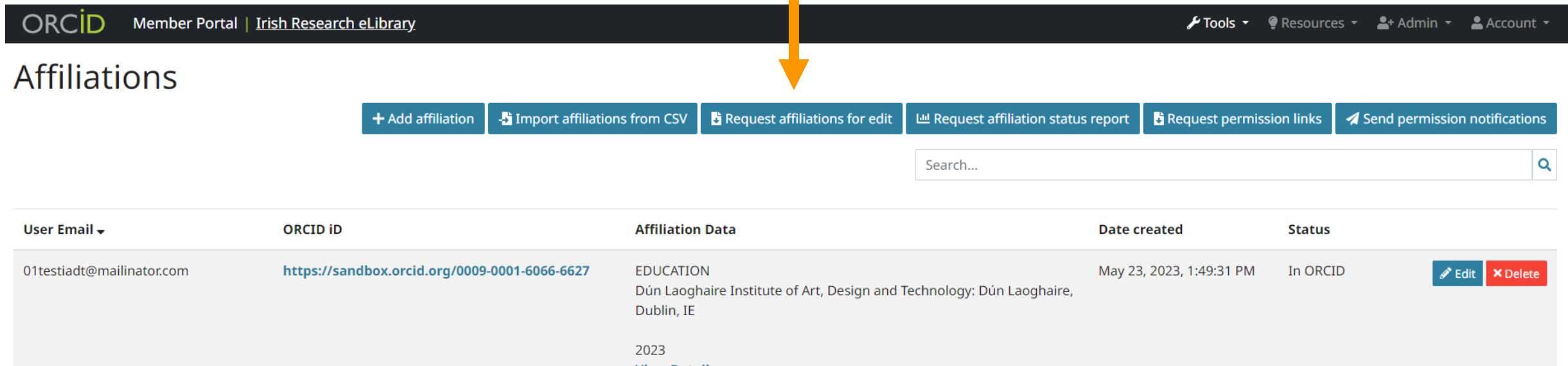
## End Year

## End Month

## End Day

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# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE



ORCID Member Portal | Irish Research eLibrary

Tools Resources Admin Account

## Affiliations

+ Add affiliation Import affiliations from CSV **Request affiliations for edit** Request affiliation status report Request permission links Send permission notifications

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User Email	ORCID ID	Affiliation Data	Date created	Status
01testiadt@mailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6627">https://sandbox.orcid.org/0009-0001-6066-6627</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE  2023	May 23, 2023, 1:49:31 PM	In ORCID

Edit Delete



# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

This is for batch editing (download csv, edit, upload).

While it is possible to add qualification records for courses in progress, we recommend in these circumstances for MicroCreds/CPDs, that records are added on course completion, so no updates to the records need to be made .

ORCID Member Portal | [Irish Research eLibrary](#)

## Affiliations

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ORCID Member Portal | Irish Research eLibrary Tools Resources Admin Account

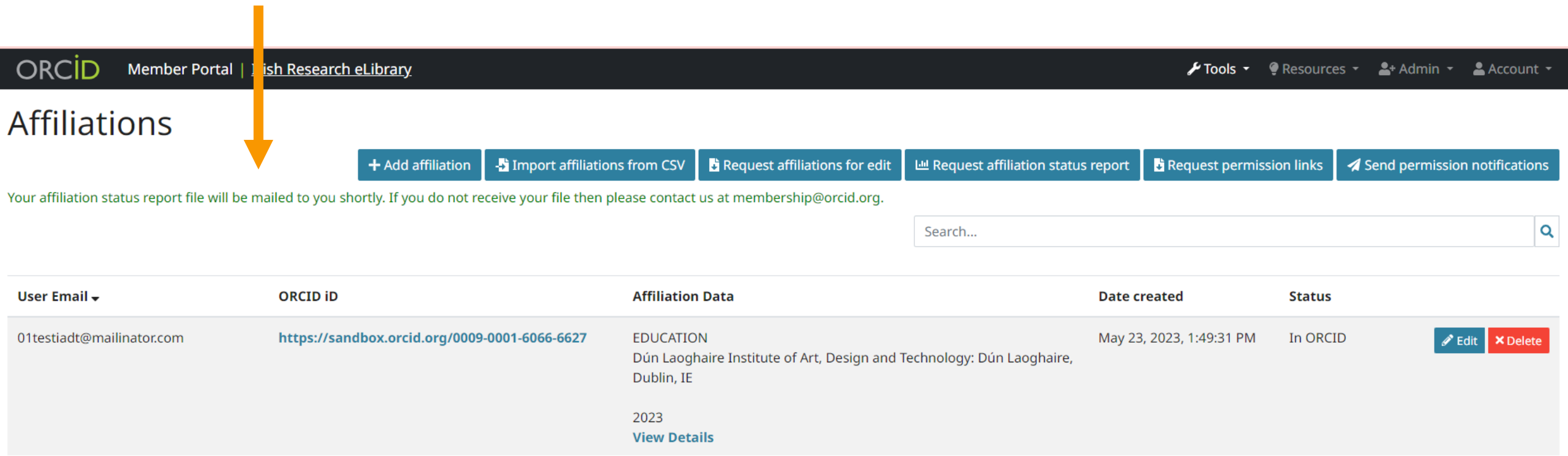
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Search...

User Email	ORCID ID	Affiliation Data	Date created	Status
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# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE



ORCID Member Portal | Irish Research eLibrary

Tools Resources Admin Account

## Affiliations


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Your affiliation status report file will be mailed to you shortly. If you do not receive your file then please contact us at [membership@orcid.org](mailto:membership@orcid.org).


Search...

User Email	ORCID ID	Affiliation Data	Date created	Status	
01testiadt@mailinator.com	<a href="https://sandbox.orcid.org/0009-0001-6066-6627">https://sandbox.orcid.org/0009-0001-6066-6627</a>	EDUCATION Dún Laoghaire Institute of Art, Design and Technology: Dún Laoghaire, Dublin, IE  2023 <a href="#">View Details</a>	May 23, 2023, 1:49:31 PM	In ORCID	<a href="#">Edit</a> <a href="#">Delete</a>

# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

 **Member Portal sandbox** ☺ 📧 ↶ ↷ ↸ ⋮

To: Catherine Ferris Thu 27/07/2023 09:56

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**ORCID**

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Please find attached your requested affiliation status report file.

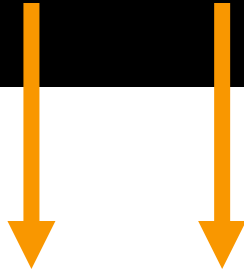
Warm Regards,  
The ORCID Member Portal Team  
[membership@orcid.org](mailto:membership@orcid.org)

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A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
email	orcid	status	putCode	created	modified	affiliation-section	department-name	role-title	start-date	end-date	org-name	org-count	org-city	org-region	disambiguation	disambiguation
01testiadt@mailinator.com	0009-0001-6066-6627	In ORCID	55040	2023-05-23	2023-05-2	EDUCATION			2023		Dun Laoghaire Institute of Technology	IE	Dun Laoghaire	Dublin	8832	RINGGOLD
catherine.ferris@mailinator.com	0000-0001-5130-220X	In ORCID	56489	2023-07-25	2023-07-2	QUALIFICATION	Kemmy Business School	Aircraft Leasing (3 ECTS, Level 9 NFAQ)	2023-11	2023-11	University of Limerick	IE	Limerick		https://ror.org/00000000	
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# THE ORCID AFFILIATION MANAGER: STEP BY STEP GUIDE

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To note: if multiple administrators are working on the ORCID Affiliation Manager in the same organisation, you will see and have the ability to edit each others records!

# Affiliation Types

Types	Definition	Suggested content	Example Roles/titles
Employment	A formal employment affiliation with an organization – paid or unpaid	Formal positions including faculty, postgraduate researchers, internships, society employee, other staff and contractors	“Professor of Chemistry” “Head librarian” “Data scientist”
Education	Participation in an academic higher education program. May be designated as in progress or unfinished	Undergraduate, graduate, masters, doctorate degrees	“PhD. Chemistry” “BS in Human Physiology” “Master of Engineering”
Qualification	Professional or vocational accreditation, certification or training undertaken by an individual. May be designated as in progress or unfinished	Professional and continuing education qualifications, training and other certification	“Data security certification” “Qualitative Methodology Mini Course” “Certificate A3” “Licence to practice”
Invited Position	An invited non-employment affiliation. The individual may be based at a different organization. This category includes formal acknowledgements of an individual’s academic efforts through honorary titles and/or positions which require no specific service. May be paid or unpaid	Honorary fellow, guest researcher, emeritus professor, visiting lecturer	“Adjunct Professor” “Guest Editor” “Key Stakeholder” “Invited Professor – Critical Thinking” “Visiting Associate Professor”
Distinction	This category is for honorary and other awards, distinctions, and prizes made by an organization in recognition of an individual’s academic or other achievements	Trophies, cash prizes, non-cash prizes, medals, honorary degrees	“Chancellor Award” “Second Place Abstract Award Winner” “University Gold Medal” “Best conference paper prize”
Membership	Paid or gratis membership of a society or association (i.e. does not include honorary memberships and fellowships as defined under Invited Position and Distinctions)	Member of an association or society	“Life member” “Associate Member”
Service	Significant donations of time, money, or other resources to an organization or community. Includes volunteer work such as society officer positions, agricultural extension work, other voluntary work	Standards body, expert panel, editorial board, study group, conference organizer, conference panel chair, committee work, project work, volunteer society officer, elected board position	“Project group member” “Member of the editorial board” “Community Manager” “National Advisory Committee member”



# THE ORCID AFFILIATION MANAGER: IMPORTANT



Members do not have access to a test environment on the ORCID Affiliation Manager - all actions taken through the ORCID Affiliation Manager are to the live ORCID production environment.



Consortium Leads have access to a test environment. Consortium Members: contact your Consortium Lead for a walk-through.

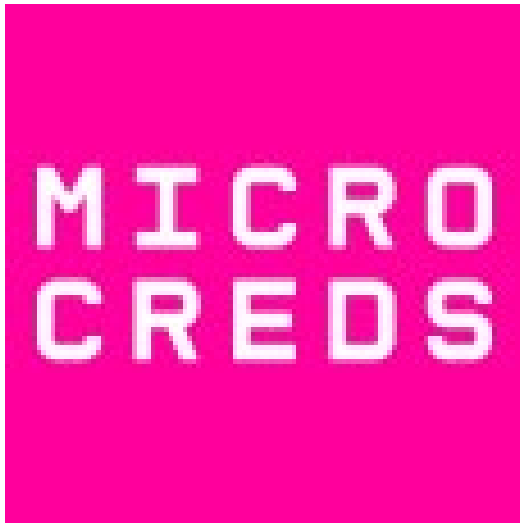


Affiliations must contain start/end dates. Affiliations without start/end dates will always appear as “current affiliations” in ORCID reporting.



If you have any questions or need any help implementing the ORCID Affiliation Manager, please contact me [Catherine.ferris@mu.ie](mailto:Catherine.ferris@mu.ie) (Ireland) or [suport@orcid.org](mailto:suport@orcid.org) (everywhere else).





**QUESTIONS**