Researcher Profiles
Setting up ORCID, Scopus, Web of Science profiles/IDs and syncing with IRIS

Summary of the process:

1. Check if you have an ORCID ID – if you do, log in; if you don’t, you need to set one up

2. Check your articles and profile on Scopus – you are automatically assigned a Scopus ID number if you have articles on Scopus

3. Check your articles and profile on Web of Science – if you don’t already have a ResearcherID number, you need to claim articles to create an ID number

4. Sync your Scopus and Web of Science (ResearcherID) profiles with ORCID – this will populate ORCID with any articles assigned to your profiles in Scopus and Web of Science

5. Sync your ORCID, Scopus and Web of Science profiles with IRIS – this will bring publication records into IRIS

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1. **ORCID (Open Researcher and Contributor ID)**

Go to the ORCID site at [https://orcid.org/](https://orcid.org/)

### 1.1 Check if you have an ORCID number/identifier:

On ORCID, type your name in the search box at the top of the screen and Enter.

- If there are no matches, it means you do not have an ORCID number, and you need to register – go to **Section 1.2**.

- If there is a match for you, click on the ORCID number to open your record.
  - On the left of the screen, check under “Other IDs” to see if you have a Researcher ID (from Web of Science) and Scopus Author ID.

### 1.2 Setting up an ORCID number/identifier

Go back to the ORCID homepage at [https://orcid.org/](https://orcid.org/)

Click on **Register now!**

Enter your details and create an ORCID password.

Enter your details and preferred settings (privacy, email frequency)

Tick the box under **Terms of Use** and **Register**

You will be sent a verification email – click on the URL in the email on the resulting screen sign in with the email and password you set up when you registered.

You will be taken to your ORCID record – your 16-digit ORCID number will be shown below your name.

You can add Education, Employment and Funding information if you wish.
1.3 Adding publications to ORCID

If you wish to add publications manually, in the Works section, click on Add Works and from the drop-down menu select Add manually.

To add works (publications) automatically from Scopus and Web of Science, you need to ensure that your Scopus and Web of Science profiles are up to date, then link them to ORCID (see section 4)

2. Scopus

If you have articles on Scopus, you are automatically assigned an Author ID.

You can check your author profile in Scopus as follows:

Go to Scopus (Library Homepage – Databases tab – type Scopus and press Enter – click on the Scopus link in the results list)

2.1 Finding your profile on Scopus:

- Click on Search at the top of the screen
- Click on Authors to search for articles by you
- Enter your details as shown below:
  - Author last name: Enter your surname
  - Author first name: Enter your first initial followed by an asterisk – this will pick up all variations of your first name/s
  - Affiliation: Enter University of Waikato
  - Select Show exact matches only
Click on Search
Results will appear for groups of publications matching your search – if there is more than one group, the one with the largest number of articles will be at the top.

The first name in the top group is a live link (circled in the screenshot above) – click on this to view the author profile (Author details).

2.2 Merging Scopus IDs to include all article groups:
(You may do this at a later stage if you wish)

- If there is more than one group of articles for you, you will be assigned a different ID number for each group of articles.
  - To claim any publications in other groups and attach them to your main Scopus ID (which feeds through to ORCID), you may need to request that all your groups are merged.
  - Only results with more than one article are shown by default – to show all matches, click on Show profile matches with one document
• Results will appear for groups of publications matching your search.
• Select the author groups that are yours, and click on Request to merge authors.

• Follow the steps in the resulting Author feedback wizard and submit

• You will receive a confirmation email – click on the link in the email and the information to be updated will be sent to Scopus who will action it within about four weeks.

3. Web of Science (ResearcherID)

If you have not already done so, you need to set up a ResearcherID on Web of Science – you are not automatically assigned an ID.

You can set up a ResearcherID and check your profile on Web of Science as follows:

Go to Web of Science (Library Homepage – Databases tab – type Web of Science and press Enter – click on the Web of Science Core Collection link in the results list)

3.1 Checking and claiming your articles on Web of Science

• On the search screen, click on More to show all search types
• Click on **Author Search**

• Fill in your details as follows:

  Last Name/Family Name: Enter your surname

  Initials: Enter your **first initial followed by an asterisk** – this will pick up all variations of your first name/s

• Tick the box next to **Exact Matches Only**

• Click on **Select Research Domain**

• On the next screen, do not select a research domain – click on **Select Organization**

• Tick the boxes beside all the organizations to which you have been affiliated (e.g. University of Waikato, University of Birmingham etc.)

• Click on **Finish Search**

• A list of articles will appear – at the top of the screen, click on the link to **Article Groups**

• Select the author groups that are yours and click on **View Records**
- Check that the articles are all yours – select the articles, click on the drop-down menu at the top of the screen and select Save to ResearcherID – I wrote these

- Fill in Number of Records and select Record Content

- In the resulting window click OK

- On the resulting screen, Sign in to ResearcherID if you have previously set up a login, or Register with ResearcherID if you haven’t – fill in all the necessary details to register and set up a username and password.
4. Syncing your Scopus and Web of Science (ResearcherID) profiles with ORCID

Go to the ORCID site at [https://orcid.org/](https://orcid.org/) and log in if necessary.

- In the Works section, click on Add Works and from the drop-down menu select Search & link

4.1 Syncing your Scopus ID with ORCID

After clicking on Search & link a list will appear – scroll down the list and click on Scopus to ORCID
On the resulting screen click on **Authorize**

Follow the steps on the next screen (Select profiles, Select profile name, Review publications etc.)

The final step will be to send your publications that are on Scopus to ORCID – click on **Send my publication list**

Your Scopus Author ID should now appear in ORCID under Other IDs (see Section 1.1)

### 4.2 Syncing your ResearcherID (Web of Science) with ORCID

After clicking on **Search & link** in ORCID, scroll down the list and click on **ResearcherID**
On the resulting screen click on **Authorize**

Enter your email address (or ResearcherID number if you have it handy) and click on **Login**

You will be asked if you want to associate your ORCID record with your ResearcherID account - click on **Yes**

Click on **Go** next to **Profile data** and **Send ResearcherID publications to my ORCID account**
Select the profile data to send to ORCID – First Name, Last Name, ResearcherID

Your ResearcherID should now appear in ORCID under Other IDs (see Section 1.1)

4.3 Syncing your ORCID account with CrossRef Metadata Search (Optional)

CrossRef is the official agency which creates DOI numbers – a CrossRef search will pick up any publications on the Web which have a DOI number.

After clicking on Search & link in ORCID, scroll down the list and click on CrossRef Metadata Search.

Click on Authorize
5. **Syncing with IRIS**

You need to sync your ORCID, Scopus and ResearcherID profiles with IRIS so that your publications appear in IRIS.

Go to [IRIS](UoW homepage – scroll down and click on IRIS under Useful links for staff).

5.1 **Sync your ORCID profile with IRIS**

- Click on **Add ORCID**

  - This will take you to ORCID- click on **Authorize**

  - In IRIS, your ORCID ID will appear under your name.

5.2 **Sync your Scopus profile with IRIS**

In IRIS, click on **Add Scopus ID** (or click on the **Menu** tab – **Manage** – **Search settings**)

On the resulting screen click on **Add Scopus IDs**

Fill in your **Scopus ID** (copy from ORCID) and click on **Skip**

**NOTE:** If you have multiple Scopus IDs see section 2.2 for instructions to merge them.
In the resulting drop-down menu select **Auto claim publications**

Click on **OK**

Your Scopus number will be added to your list of External profiles in IRIS

5.3 **Sync your Web of Science (ResearcherID) profile with IRIS**

In IRIS, click on the **Menu** tab – under **Manage**, click on **Search settings**

On the resulting screen click on **Add ResearcherID**

Fill in your **ResearcherID** (copy from ORCID) and click on **Skip**

Now when you go to the **Menu** tab – **Manage** – **Publications** – **Automatic claiming**, and scroll down to **Online database IDs**, you will see both your Web of Science and Scopus IDs – new articles attached to these IDs will automatically be claimed by your profile in IRIS