

# The New Zealand ORCID Consortium

## Information for New Members

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## Welcome to the New Zealand ORCID Consortium

Welcome to the New Zealand ORCID consortium! [ORCID](#), the global Open Researcher and Contributor ID is a trustworthy researcher identification registry and a means of system-to-system communication for authenticated information. Joining the ORCID consortium gives you the benefits of premium ORCID membership, including access to 5 sets of ORCID's member API credentials, technical support from Royal Society Te Apārangi and ORCID Inc, and monthly analytic reports tailored for your organisation. New Zealand ORCID consortium members also have access to the NZ ORCID Hub. The [NZ ORCID Hub](#) is a unique easy-to-use web application that allows all consortium members to read from and write to the ORCID records of their staff and/or students.

Royal Society Te Apārangi is the lead agency for the New Zealand ORCID consortium. We aim to make the consortium an inclusive community of practice and we urge you to share your ORCID successes and challenges with other consortium members. We also organise regular events and showcases for our members. If you have a request for any events that we could deliver soon for your organisation or the wider consortium, then please let us know.

## Who's who in the New Zealand ORCID consortium?

**ORCID Consortia** are groups made up of non-profit ORCID members all based within the same country or region. These consortia are managed by a single lead organisation (in this case **Royal Society Te Apārangi**) and benefit from a community of practice, as well as the other benefits listed above. There are 27 ORCID consortia situated around the world.

**Alex Freemantle** is the ORCID Lead at the Royal Society Te Apārangi. Alex's role focuses on delivering on the objectives for the New Zealand ORCID Consortium. This includes managing the relationship between Royal Society Te Apārangi, ORCID Inc, and the Ministry of Business, Innovation and Employment (MBIE) who fund the consortium. Alex also supports consortium members with Tier 1 technical support, maintains the consortium infrastructure and documentation, and oversees the New Zealand ORCID Hub to ensure that it fulfils the needs of consortium members.  
([alex.freemantle@royalsociety.org.nz](mailto:alex.freemantle@royalsociety.org.nz))

**The Advisory Committee** represents the interests of all New Zealand research sectors which are involved in the consortium. The committee comprises representatives from all sectors of the New Zealand research system and aims to provide feedback to the consortium lead on how ORCID is being implemented around the sectors and particularly any challenges being faced.

**All consortium members' main and technical contacts** and their contact details (where they have given permission for them to be posted) are [here](#).

Our preferred contact email for all communications, including support, is [orcid@royalsociety.org.nz](mailto:orcid@royalsociety.org.nz)

## The New Zealand ORCID Consortium Induction Process

In order to have received this information pack, you will already have signed the ORCID Accession Agreement, and that agreement will have been counter signed by the ORCID Inc Executive Director. The Royal Society Te Apārangi will have sent your Main and Technical contact details to ORCID Inc and you will both soon be added to the ORCID Member Portal. Details about the ORCID Member Portal and the associated analytic report can be found in the ORCID documentation [here](#). Information regarding your next steps with the consortium and using the NZ ORCID Hub will be presented in the remainder of this information pack and the ORCID Lead will arrange to meet with you soon to discuss your new membership.

## Roles at your organisation for the New Zealand ORCID consortium

**Main contact** – The main contact is the primary representative and advocate for ORCID within each member organisation. The main contact will have access to the tailored statistics for their organisation in the ORCID Member Portal. This report includes a range of analytics such as the number of ORCID record holders using an institutional email address. The main contact person also receives the New Zealand ORCID consortium’s quarterly newsletter and may be contacted directly regarding events and workshops.

**Technical contact** – The ORCID technical contact is responsible for managing the API credentials for their organisation. If the organisation intends to use the NZ ORCID Hub then the technical contact does not have to be a ‘technical’ person, as the Hub can be utilised with just a web browser, a spreadsheet, and an email system. If the organisation wants to build a direct system integration with ORCID then the technical capabilities of this person will need to be greater than for a Hub user.

**Voting member** – As an ORCID member organisation, you have the right to vote in ORCID’s annual board elections. Your voting member will be sent voting information by ORCID towards the end of the year. Your voting member can be your ORCID signatory, your main contact or someone else from your organisation.

**Note** - If you wish to change the nominated main or technical contact for your organisation then you can either request these changes in your ORCID Member Portal page or you can email the Royal Society Te Apārangi with written confirmation and written consent from the existing role holder. We, as lead agency, will inform ORCID of changes to contacts. Additional staff members can be given access to the Member Portal by the Main or Technical Contacts.

## The New Zealand ORCID Hub

The [NZ ORCID Hub](#) is a web application that allows all New Zealand ORCID Consortium members to read from and write to their staff/students’ ORCID records, provided they have the record holder’s permission. This ensures that authoritative information is written to ORCID records, promoting trust in the research system. This resource is unique to New Zealand and enables organisations to engage with ORCID without having to develop custom integrations.

### Roles in the Hub

#### The Technical Contact:

1. Requests the organisation’s API credentials from ORCID and stores these securely.
2. Able to write information to ORCID records.

#### The Organisation Administrator(s):

1. Able to write information to ORCID records.

The Technical Contact and the Organisation Administrator(s) can be anyone with the authority to assert information onto ORCID records for your organisation. If not already involved in your organisation’s HR system, your Technical contact and/or Organisation Administrator(s) will need to liaise with your HR team to obtain relevant information such as job titles and start/end dates for roles. An organisation can have as many Hub Administrators as you wish, however, there can only be one Technical Contact.

### Writing to ORCID Records Using the NZ ORCID Hub

The NZ ORCID Hub can assert information to all sections of the ORCID record afforded by ORCID’s API 3.0. These sections include:

- Affiliations: education, employment, invited positions, distinctions, membership, service

- Researcher properties: websites, keywords, countries, other names, other IDs
- Works: publications, conference outputs, intellectual property, other
- Research Resources: infrastructure, collection, equipment
- Funding
- Peer-review

**Note:** As a condition of your Consortium accession agreement, your organisation has agreed that you will only assert information in ORCID records that you can verify as true. Although possible, please do not assert information that does not originate from your organisation. For example, if a member of staff has multiple affiliations.

User guides for the Hub, including sample upload files are in the [hub resources section of our website](#). The [Hub's documentation](#) also explains more about file formats for writing to all sections of the ORCID record. Our members most often use the file/task upload section of the Hub to make changes to ORCID records. These files must be in csv or json format, although json format allows for more complex tasks to be uploaded.

If your organisation is a Tuakiri member then when your staff/students sign into the Hub for the first time, a basic employment/education affiliation is added to their ORCID records using Tuakiri held information. Note that using Tuakiri does not enter course/job titles, department or dates to the ORCID record, therefore a file mediated method is preferred owing to the richer detail that can be asserted.

### **The Hub CV Tool**

In addition, the Hub features a CV template tool which individual researchers can use to pull information from their ORCID record and generate a CV. It is hoped that this CV will be useful in applying for funding from MBIE, the HRC and the Royal Society Te Apārangi, as well as a standalone resource.

### **Forming an ORCID communications strategy at your organisation**

It is important to have an organisational ORCID communications strategy in place in order for your staff and students to be aware of and engage with ORCID. ORCID recommends a three-stage approach:

1. An Anticipation Stage: Letting people at your organisation know what ORCID is and how it can help them.
2. An Engagement Stage: Getting people to sign up for ORCID iDs and connect them to your organisation, explaining why they should do this. At this point, people need to know what the Hub is and what it does. Your Technical Contact and Organisation Administrator, if you have one, need to know how to use the Hub.
3. An Ongoing Awareness Campaign: Reminding people when to use their ORCID iDs, for example, at grant application time or when producing research outputs.

You should communicate with your researcher and contributor community to ensure they know **what** ORCID is, **why** its use is being encouraged within your organisation and **how** it is being used in your organisation's internal systems.

### **Information Sources for Consortium Members**

**ORCID Planning Worksheet:** You may wish to utilise this [ORCID Planning Worksheet](#) to consider how you could use your ORCID membership within your organisation. This worksheet is based on a similar resource developed by Lyrasis (USA Consortium).

**New Zealand Consortium Newsletter:** A New Zealand ORCID Consortium newsletter is sent by email to all member Main Contacts on a quarterly basis. This newsletter includes up to date information about the consortium including any upcoming events and interesting articles or updates from ORCID Inc.

**ORCID's monthly newsletter:** ORCID Inc also sends out their own members' monthly newsletter with general ORCID news.

**Consortium Sharespace:** [This section](#) of the Royal Society Te Apārangi website contains information and resources that consortium members have agreed to share with others. These include communications plans, experiences with ORCID and outreach resources.

**Google Group:** We have a [Google Group](#) which provides consortium members with a space to share stories and experiences about ORCID at their organisation. This Google group also lists information relevant to the development of the NZ ORCID Hub.

**ORCID Events:** ORCID have launched an ORCID On Demand page which lists recordings of their events that you may have missed. You may also want to check out their [Vimeo channel](#) which includes a range of previous event recordings. ORCID also have a [twitter account](#), where notices about upcoming events are posted.

We hope that this information pack has been useful in providing you with background information about the New Zealand ORCID Consortium and the NZ ORCID Hub. This resource is meant solely as an introduction, so please do speak to the ORCID Lead if you have any further questions or would like to discuss anything specific to your organisation ([orcid@royalsociety.org.nz](mailto:orcid@royalsociety.org.nz)).