

The New Zealand ORCID Consortium

Information for New Members

Royal Society Te Apārangi

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Welcome to the New Zealand ORCID consortium

Welcome to the New Zealand ORCID consortium. Joining the consortium gives you the benefits of premium ORCID membership, including access to ORCID's member APIs, use of the NZ ORCID Hub, personalised support, and receipt of ORCID's monthly newsletter which includes tailored statistics for your organisation. The most exciting feature of our New Zealand consortium is the NZ ORCID Hub, which currently allows all consortium members to read from and write to the ORCID records of their staff and/or students.

Royal Society Te Apārangī 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 via both our [sharespace](#) and our community [Google Group](#).

We recommend putting the ORCID member organisation image below on your website to let people know that your organisation supports ORCID.



Who's who in the New Zealand ORCID consortium?

Jason Gush is the ORCID programme manager – he manages the relationship between Royal Society Te Apārangī, ORCID, and the Ministry of Business, Innovation and Employment (MBIE) which funds the consortium. He also oversees the New Zealand ORCID Hub.

Jill Mellanby is the ORCID coordinator– she supports consortium members, maintains the consortium infrastructure, writes documentation and communications, and works with the advisory committee. Together with Jason she offers tier 1 support to consortium members.

The University of Auckland is the consortium's technology partner and was responsible for the development of the NZ ORCID Hub.

The Advisory Committee represents the New Zealand research sectors involved in the consortium – this committee provides feedback to the consortium lead on how ORCID is being implemented around the sectors, 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

Roles at your organisation for the New Zealand ORCID consortium

Main contact – the ORCID main contact for an organisation will receive ORCID’s monthly newsletter; this contains tailored statistics for each organisation: the number of ORCID record holders using an institutional email address. The main contact also receives the New Zealand ORCID consortium’s quarterly newsletter, and should communicate relevant information from these sources to others in their institution.

Technical contact – the ORCID technical contact is responsible for managing the API credentials for the organisation. If the organisation intends to use the NZ ORCID Hub the technical contact does not have to be a ‘technical’ person, as the Hub has a simple user interface. If the organisation wants to build a direct system integration with ORCID the technical capabilities of this person have to be greater than for a Hub user. There can only be one technical contact for an organisation at any time.

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 that you wish to nominate as your voting representative; however, as with technical contacts, there can only be one voting member for an organisation at any time.

Note - If you wish to change the nominated main or technical contact we will need written confirmation, together with written consent from the existing role holder. We, as lead agency, will inform ORCID of changes to contacts. ORCID will only send communications to those people who are confirmed by us, as the main, technical and voting contact for each organisation.

The New Zealand ORCID Hub

The [NZ ORCID Hub](#) is an easy-to-use web application that allows organisations, both large and small, to connect with ORCID to read from and write to their staff/students’ ORCID records, with the record holder’s permission. The source of information in ORCID records is the organisation, rather than the record holder, promoting trust in the research system. Your organisation’s name appears in the format that you wish.

Roles in the Hub

The key role in the Hub is the Technical Contact, appointed by each consortium member organisation. For additional Hub support, organisations may also appoint one, or more, Organisation Administrator(s).

The Technical Contact:

1. Requests the organisation’s API credentials from ORCID and stores these securely. Hub users do this via a simple user interface.
2. Uses the Hub to request permission from researchers to read from and write to their ORCID records, and uses the Hub to act on this permission.

The Organisation Administrator:

1. Performs the same role as the technical contact, with the exception of requesting and managing the organisation’s API credentials.

Both the Technical Contact and the Organisation Administrator(s) can be anyone with the authority to assert information in ORCID records for your organisation. They can link your staff and students’ ORCID records to your organisation via the Hub, and keep information up to date on a regular basis as people join or leave 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.

The Hub can write to all sections of the ORCID record allowed by ORCID's API 3.0:

Affiliations – affiliations are any of the following: employment / education / qualification / invited position / distinction / membership / service.

Funding – The Hub is able to write grants received to the **funding** section of an ORCID record.

Works – The Hub is able to write research outputs to the **works** section of an ORCID record.

Research resources – The Hub is able to write research resources used to the **research-resources** section of an ORCID record.

Peer-review – The Hub is able to write review activities to the **peer-review** section of an ORCID record.

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 an additional employment affiliation at another organisation.

User guides are available in the [hub resources section of our website](#). The [Hub's documentation](#) explains more about file formats for writing to all sections of the ORCID record.

Information Sources for consortium members

NZ consortium newsletter – We send out a New Zealand consortium newsletter approximately quarterly, or when there is information to share, to the main contact for each member organisation. Previous newsletters are at the bottom of [this page of our website](#).

Google Group - we encourage consortium members to share stories and experiences about ORCID at their organisation.

ORCID's monthly newsletter – ORCID sends out their own members' monthly newsletter with ORCID news. The 'Your member data reports' section is tailored to each specific recipient. This section will tell you how many ORCID records are registered to people with email domains for your organisation. Bear in mind that not everyone at your organisation will use their organisational email address in their ORCID record.

Forming an ORCID communications strategy at your organisation

It is important to have an organisational ORCID communications strategy in place. 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 – encouraging 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.

ORCID's Collect and Connect Programme

ORCID developed their 'Collect and Connect' programme to encourage all organisations to use a consistent approach to integrating ORCID into their workflows. This should ensure that everyone, no matter what institution they work at or move to, has the same ORCID experience.

Collect and Connect is a system of badges. ORCID awards these, annually, to organisations that meet the essential requirements of implementing ORCID at each stage of the workflow in their internal systems. These requirements are based on:

- using the ORCID APIs to integrate systems with ORCID correctly.
- communicating with an organisation's user community to ensure they know **what** ORCID is, **why** its use is being encouraged within the organisation and **how** it is being used in the organisation's internal systems.

The badges are



New Zealand ORCID consortium member organisations who are using the Hub and providing adequate information to their community about ORCID, as described above, are eligible for four badges, from authenticate through to connect.