

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, an 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 via our [Google Group](#).

Who's who in the New Zealand ORCID consortium?

Jason Gush is the ORCID programme manager – he manages the relationship between Royal Society Te Apārangi, ORCID, and the Ministry of Business, Innovation and Employment (MBIE) who fund the consortium; he also oversees the New Zealand ORCID Hub to ensure that it fulfils the needs of consortium members. (Jason.Gush@royalsociety.org.nz)

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 the ORCID programme manager she offers tier 1 support to consortium members. (Jill.Mellanby@royalsociety.org.nz)

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 main contact for an organisation will receive ORCID's monthly newsletter which contains tailored statistics for each organisation: 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. The main contact is often the voting representative from the organisation for ORCID's annual board elections.

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 the technical contact does not have to be a 'technical' person, as they will use a web browser, a spreadsheet and an email system. 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.

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. 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. Note that 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 a web application that allows all organisations to read from and write to their staff/students' ORCID records, with the record holder's permission. This ensures that authoritative information is written to ORCID records, promoting trust in the research system.

Roles in the Hub

The Technical Contact:

1. Requests the organisation's API credentials from ORCID and stores these securely.
2. Writes information to ORCID records.

The Organisation Administrator(s):

1. Perform 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 role information in ORCID records for the 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.

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

- Affiliations: education, employment, invited positions, distinctions, membership, service
- Researcher properties: websites, keywords, countries, other names, other IDs
- Funding
- Works
- Research Resources
- Peer-review

In addition to this, the Hub is able to generate a New Zealand RS&T CV by pulling content directly from a user's ORCID record. Feedback on this feature is appreciated, with the hope being that this CV will be useful in applying for funding from MBIE, the HRC and Royal Society-administered programmes such as the Marsden Fund.

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.

Reading from/writing to ORCID records via the Hub

User guides for the Hub, including sample upload files are 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.

If your organisation is a Tuakiri member you can opt to write employment/education affiliation information to ORCID records using Tuakiri held information. Note that using Tuakiri does not enter course/job titles, department or dates to the ORCID record.

The following table explains some pros and cons of using Tuakiri versus file upload to write employment/education affiliations to ORCID records:

Automatic method via Tuakiri	File mediated method
<p>PROS</p> <ul style="list-style-type: none"> ➤ No need for ORCID entry to be updated if/when an individual leaves an organisation. ➤ Small amount of work for an organisation to write affiliations for a large number of people using the Hub. 	<p>PROS</p> <ul style="list-style-type: none"> ➤ Information rich affiliation entry can be written to ORCID records containing start/end date, job title, department OR if a student, the same information (but course title instead of job title). These affiliations can be updated if a person moves roles within the organisation or leaves to work elsewhere.
<p>CONS</p> <ul style="list-style-type: none"> ➤ Many researchers want richer information about their job title and department to be written to their record. ➤ Many organisations want start dates and end dates to be visible in order to make it clear whether a person's employment status is current or past. 	<p>CONS</p> <ul style="list-style-type: none"> ➤ Manual file upload required. New file needs to be uploaded at regular intervals as people leave/arrive or change roles within the organisation. ➤ Liaison may be required between the organisation administrator and the HR department, or whoever keeps employment records within the organisation.

As can be seen – the file mediated route requires more ongoing work, and this work needs to be factored into an organisation's use of the Hub.

Information Sources for consortium members

NZ consortium newsletter – a New Zealand consortium newsletter is sent out on a quarterly basis.

Consortium sharespace – [this section](#) of our website contains information and resources that consortium members have agreed to share with others. These include communications plans, ORCID experiences and outreach resources.

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.

ORCID's Vimeo channel, is useful, as is their [twitter account](#), where notices about up-and-coming events are posted; it's worth keeping your eye on this.

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 – 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.