NZ ORCID Consortium newsletter #5

In this issue of the New Zealand ORCID Consortium newsletter

Changing an ORCID Contact?

Do you have to change the nominated main or technical contacts at your organisation? ORCID will only send communications, including organisational credentials for using the APIs, to the nominated individuals at each consortium member organisation. If you need to change the nominated contacts please let us know by email, and include a message from the outgoing contact stating that they agree to the change. We will then notify ORCID, who will update their own contact list.

Advisory Committee

Richard Waldin, from Scion, will be joining the NZ ORCID Advisory Committee. He will replace Andrew Watkins, previously of NIWA. We will welcome him at the next meeting on 20th October.

ARMS 2017 conference – consortium meeting

On Tuesday 26th September, as part of the 18th Australasian Research Management Society conference, hosted by Te Papa Tongarewa, Wellington, we are hosting an ORCID consortium meeting, held jointly with the Australian Access Federation, the lead agency for the Australian ORCID Consortium. If you or anyone else at your organisation is going to ARMS 2017, we would be delighted if you came to this session, running from 9.00 until 12.30 here at the Royal Society Te Apārangi offices, 11 Turnbull Street, Thorndon, Wellington. The programme for the event is on the [ARMS website](#). A bus will run from the main conference venue, Te Papa, to and from this event. Participants will be returned to Te Papa in time for the afternoon sessions there.

This meeting will take the format of some short presentations and a showcase of the current status of the Hub, and will give participants the opportunity to make suggestions for enhancements. The audience will be invited to do 'lightning presentations'. These are short 5-8 minute talks, with or without powerpoint slides or similar, covering ORCID at your organisation: communication strategies – what works and what doesn't –, integrations, and anything else ORCID related that would be of interest to those present. Please contact us at orcid@royalsociety.org.nz if you are interested in doing a lightning presentation.

Laurel Haak, Chief Executive of ORCID, will be at this meeting, as well as members of the Australian Access Federation so it will be a good opportunity to share experiences about the implementation of ORCID with different Consortia organisations.

NZ ORCID Hub

Many more Tuakiri member organisations have now been through the process of onboarding their organisation to the Test Hub, setting up a sandbox ORCID record and connecting it, resulting in the Hub writing an affiliation to their sandbox ORCID.

Members who have onboarded to the test Hub: **Landcare Research; NIWA, AgResearch, ESR, Plant & Food Research, AUT, University of Canterbury, VUW, University of Auckland, University of Otago, Royal Society Te Apārangi , University of Waikato, Ara Institute of Canterbury.**

Many of those who have gone through testing have now moved on to the production Hub. Members currently with production Hub integrations are**: AUT, VUW, NIWA, Plant & Food Research, University of Canterbury, Royal Society Te Apārangi, University of Auckland.**

The NZ ORCID Hub for non-Tuakiri consortium members

We have been working on the Hub's next development phase: to allow non-Tuakiri members to use the Hub to write affiliations for staff and students. A non-Tuakiri organisation guide to onboarding and testing the Hub, for technical contacts, is now in place in the [Hub resources section of our website](#).
First, we need to authenticate the organisation's Technical Contact in the Hub.
The workflow that we have designed is as follows:

- A non-Tuakiri Technical Contact will need to create an ORCID record with their email address **AND** makes this address either 'trusted-party' or 'public' from its default setting of 'private'.
- The Technical Contact lets us know that they are ready to onboard, and we send an invitation to the email they've used in their ORCID record.

- Clicking the link in that invitation takes the Technical Contact to ORCID with the notice that the 'NZ ORCID Hub' wants to 'Read your limited-access information'.
- The Technical Contact provides their ORCID credentials, clicks 'Authorize' and is returned to the Hub.
- The Hub compares the email address from the ORCID record with the one the email was sent to and, if they match, the Technical Contact is logged into the Hub with their identity confirmed and their ORCID iD known.

As soon as the Hub knows an individual's ORCID iD, they're able to log into the Hub using that ORCID record.

Once in the Hub, the Technical Contact onboards the organisation in exactly the same way that Tuakiri-member Technical Contacts do, i.e., for testing see here: A guide to a Tech Contact's onboarding on the Test Hub: https://groups.google.com/a/aucklanduni.ac.nz/forum/#!topic/nz-orcid-hub-gg/LOqqRsIbQcc picking up from where the Technical Contact is 'returned to the Hub with their identity confirmed'. At this point the Technical Contact can edit the visibility of their email address in their ORCID record and reset it to 'Private', if desired.

The second step is to provide information about the organisation's staff (and students). These next steps can be performed by a Technical Contact, and if the organisation has nominated them, Organisation Administrators.

- A Technical Contact uploads a file to the Hub (a sample csv file is available in the [Hub resources section](#) of our website), containing the following information:
  first name, **last name**, **email address**, organisation, department (or campus), city, title (or course), start date, end date, and **affiliation type**. The information in bold is required, and everything else is optional. The more information you provide, the more information will be written to the affiliation section of your users' ORCID records.
- The Technical Contact then clicks a button in the Hub to both affirm that this information is correct, and, depending on whether the individuals referenced have been through the Hub already, two separate processes kick off:

- o If the Hub already has a working 'write' access token associated with this email and organisation, the affiliations are written immediately.
- o If the Hub doesn't have a record of the email address, or the token associated with the address doesn't have write-permission, an invitation email is sent containing a link to click.

  This link takes them to ORCID with the notice that the Organisation wants to 'Add and update your activities; Read your limited-access information'. They can either 'authorize' with credentials for an existing ORCID record or create one, if they don't already have an ORCID.

  Once 'authorized', they're directed to the Hub with notice that their affiliation will be written.

Note – you will have to do some internal communications about ORCID and the Hub's ability to write affiliation records BEFORE sending this Hub generated email to your researchers so that they know to expect it.

We currently have two organisations testing the above workflow, more are encouraged as this feature represents the second milestone of the Hub's development, and participation is no longer limited to Tuakiri-members, who can use the non-Tuakiri workflow model, from the stage of uploading a file of information to the Hub.

Writing richer affiliation information for Tuakiri members

Some of you who use Tuakiri have expressed disappointment at the level of information that is written to an ORCID record by the Hub, pointing out that the information that users have written in their ORCID records themselves is much richer than a Hub-written affiliation. By using Tuakiri as an authentication service, the Hub takes only the information about individuals held by Tuakiri – which, as many of you have pointed out, is minimal: simply the name of the organisation and the individual's employment/education relationship to it.

As noted above, to improve on this bare-bones affiliation, Tuakiri members can expand the affiliation information by following a similar workflow to that for non-Tuakiri members, picking up the non-Tuakiri workflow from where a file of information about staff/students is uploaded to the Hub. Those students/staff who have already linked their ORCID records

with their institution in the Hub can immediately have this richer information written to their ORCID records.

The Hub recognises their email address, knows that they have already given permission for the Hub to write to their ORCID record and adds more information; no action is required from the staff/student member.

Organisation Administrator role in the Hub

As a condition of the ORCID Consortium license agreement, we have asked Consortium members to nominate one Main and one Technical Contact to manage ORCID membership for their organisation. In addition to these two roles, we've been asked to create an Organisation Administrator role for the Hub. The anticipated tasks of such an Administrator would be:

- Upload csv files of staff/students to the Hub
- Send emails via a one-click action from the Hub to invite staff /students to create or connect their ORCID iDs to have an affiliation written to their ORCID record
- Maintain records in the Hub for the organisation

Note that Technical Contacts can also do all of the above, in addition to accessing the organisation's ORCID credentials. There is no requirement for an organisation to appoint an Organisation Administrator if their Technical Contact is happy to carry out the above activities.

Technical Contacts, please let us know if you would like to nominate one or more Organisation Administrators for your organisation.

Getting buy-in to ORCID from the research community – lessons learned from other consortia

A recent community survey run by JISC, the UK ORCID consortium lead, showed that one of the challenges for consortium members was getting buy-in to ORCID from the research community. The Australian Access Federation (AAF), the Australian ORCID consortium lead, has some resources on their site with examples of ORCID outreach strategies and communication examples used with some of their consortium members. If you have a communication strategy at your organisation that is proving to be successful in engaging

your community with ORCID, and would be willing to share with other members of the NZ consortium, we would love you to put it on the [Google Group](#) that we have set up as a community resource.

Voting for ORCID Board Members

In the coming month ORCID will be sending out voting papers to the nominated voting representative at each consortium member organisation to vote for the 2018 board. We will be contacting you shortly to ask for confirmation of the voting contact for your organisation.

Website

As a result of several Tuakiri organisations testing and then onboarding to the production (real) version of the Hub quite a few questions have arisen. Several new [FAQS](#) have been posted to the website.

Your News Here

We encourage members to share their experiences with ORCID at their organisations by posting to the consortium's [Google Group](#). Thanks to Anton and Stuart at University of Canterbury for [helpful feedback on their Hub experience](#).

Our contact address is orcid@royalsociety.org.nz

Previous NZ ORCID consortium newsletters are to be found at the bottom of the '[about the consortium](#)' page of our website. Unfortunately, because of the structure and background workings of our new website, strangely, they cannot be hosted on the 'news' page.

Our mailing address is:
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