



# NZ ORCID Consortium newsletter #7

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**ORCID**  
Connecting Research  
and Researchers

Member  
Organization

## New outreach resources from ORCID

ORCID have reorganised their [outreach resources](#) for use by members to promote the use of ORCID at their organisations. They have also developed a new video called “[why ORCID](#)” to sit alongside their ‘[What is ORCID](#)’ video. This 25 minute [webinar](#) introduces the resources and how they can be used.

If any New Zealand ORCID consortium members have resources they’ve used successfully and would be willing to share with other members please send them to us and we will set up a dedicated space. We can also help you to prepare resources or advise on the best formats for you to use in your own ORCID outreach endeavours.

## The Hub – update

**Who’s in the production Hub:** AUT, VUW, University of Otago, Plant & Food Research, University of Canterbury, NIWA, ESR, University of Auckland, Ara Institute of Canterbury, Lincoln University, AgResearch, Royal Society Te Apārangi.

**New developments in the Hub:** testing the ability to write funding information. Because a funding item can be related to more than one person a simple csv/tsv file isn’t enough. Currently, we are looking at JSON and YAML files as the best options. If this means nothing to you, don’t worry; if you ever need assistance with writing funding information files we will be happy to help you when the time comes. Thanks to those of you who have come along to the fortnightly Hub demo sessions and asked questions / provided suggestions for enhancements. If you have missed a session or can’t come to one and want us to record it please let us know as we don’t record routinely. Past recordings are [here](#).

## Comparison of automatic and file-mediated affiliations written to an ORCID record

Here are two examples of affiliations written to an ORCID record using the Hub. The first example shows a record written using the automatic route, only available to Tuakiri-members – there is no start date, no job title, department, or end date if the person no longer works in that role. We are calling this a ‘vanilla’ affiliation.

▼ Employment (1)

Sort

Royal Society Te Apārangi: Wellington, New Zealand

Source: The Test NZ ORCID Hub

Created: 2017-11-15

Now, compare this to a file-mediated affiliation, via a file upload route by a technical contact or organisational Hub administrator. This can have rather more information in it:

Royal Society Te Apārangi: Wellington, New Zealand

2014 to present | Programme Manager - Insights and Evaluation (Research Funding)

Source: The Test NZ ORCID Hub

Created: 2017-09-25

Royal Society Te Apārangi: Wellington, New Zealand

2011 to 2014 | Senior Evaluation Officer (External Affairs)

Source: The Test NZ ORCID Hub

Created: 2017-09-25

Some Tuakiri member organisations are using the file-mediated route as a means of allowing their staff to have these richer affiliations written to their ORCID records. Contact us if you are interested in doing this.

Below are some pros and cons of using each route to write affiliations:

Automatic method via Tuakiri	File mediated method
<p>PROS</p> <ul style="list-style-type: none"> <li>➤ No need for it to be updated if/when an individual leaves an organisation.</li> <li>➤ Small amount of work for an organisation to write affiliations for a large number of people using the Hub.</li> </ul>	<p>PROS</p> <ul style="list-style-type: none"> <li>➤ 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 institution or leaves to work somewhere else.</li> </ul>
<p>CONS</p> <ul style="list-style-type: none"> <li>➤ Many researchers want richer information about their job title and department to be written to their record.</li> <li>➤ 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.</li> </ul>	<p>CONS</p> <ul style="list-style-type: none"> <li>➤ Manual file upload required by a designated 'Hub administrator' at an organisation. New file needs to be uploaded at regular intervals as people leave/arrive or change roles within the organisation.</li> <li>➤ Liaison is required between the Hub administrator and the HR department or whoever keeps employment records within the organisation.</li> </ul>

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.

Here's an example of how the headers in the file you upload using the non Tuakiri route match up with what's written to an ORCID record:

### Headers for manual upload

affiliation =student affiliation =staff
organisation city region country: not required. New Zealand will be filled in automatically
start date end date :left as 'to present' if none entered. course or title :(for students, course title; for staff, job title) department

▼ Education (1) <span>Sort</span>
Royal Society Te Apārangi: Wellington, New Zealand 2016-09 to present Source: The Test NZ ORCID Hub Created: 2017-09-25
▼ Employment (20) <span>Sort</span>
Royal Society Te Apārangi: Wellington, New Zealand 2014 to present   Programme Manager - Insights and Evaluation. (Research Funding) Source: The Test NZ ORCID Hub Created: 2017-09-25
Royal Society Te Apārangi: Wellington, New Zealand 2011 to 2014   Senior Evaluation Officer. (External Affairs) Source: The Test NZ ORCID Hub Created: 2017-09-25
Organisation: City, Region, New Zealand Course/Title (Department) Source: NZ ORCID HUB for the Royal Society of New Zealand Created: 2017-11-12

The other headers you'll likely be using are **email address** and **ORCID iD**. An ORCID iD from your own systems is optional; however unless the individual has already connected their ORCID iD through the Hub, the email address is absolutely required for the Hub to work.

The other header causing a little confusion is **identifier**; this optional value should be unique to each affiliation and is only to help make updating in future simpler.

For example: for the education/employment in the example above the three Royal Society Te Apārangi affiliations were all written at once from a single file upload with information taken out of an HR system. Each affiliation written in your file is returned to the Hub with a set of digits known as ORCID's put-code. With a unique identifier it becomes relatively simple to record the put-code in a system so that if the time comes to put an end date on the '2014 to present' it's the right assertion that gets updated.

## New FAQs relating to the Hub

Q – What if someone is both a staff and a student?

A – Put each in a separate row with affiliation as staff in one, and student in another – two affiliations will then be written.

Q – Do I need to enter the country in the file I upload?

A – No – New Zealand is automatically written by the Hub. Leave this column blank, or, if you wish, enter NZ.

Q – How do I update information in an ORCID record, using the file upload method?

A – When you write an affiliation the first time, ORCID assigns a number to the entry, called a PUT code. This is visible for each record in your administrator tools in the Hub. To update information, write a new tsv/csv file and include a new header called ‘PUT CODE’ with this number in, as well as the new information in your end date column. When you upload this file to the Hub and activate, the new information will be written to the existing ORCID record as ORCID matches the PUT code for the information to that record.

## **Who receives this newsletter?**

Currently, this newsletter is sent to the main and technical contact for each consortium member organisation and to a few other people who have asked for ORCID related communications. If you want to know who is receiving it at your organisation or if other people at your organisation want to receive it, please contact us.

## **New consortium induction pack**

We are putting together an induction pack for new consortium members. Please let us know what would you find useful, as a new consortium member, so that the most relevant information is given out, rather than what we think *might* be useful.

## **Building your own integration?**

We are here to support both Hub users and also those organisations who are building their own in-house ORCID integration.

API 2.1 has now been released. The only change from API 2.0 is that the canonical ORCID iD is now https rather than http. If you are building your own ORCID integration we encourage you to use https ORCID iDs. This will be required in order to qualify for ORCID’s Collect and Connect programme’s ‘display’ badge, from 2018.

Contact us for support:

- In the planning and design stages
- In the testing stages
- When you think it’s ready to go – we need to run through a checklist with you to ensure it’s all working as planned before you are able to request production credentials from ORCID.

## **Two non-Hub integrations being built so far:**

- Royal Society Te Apārangi – building ORCID integration into our in-house portal for the grant applications that we administer.
- MBIE – building into their grants management system. Not being made compulsory but available for anyone to use.

You can build an ORCID integrations into your own institutional system.

Examples: staff can apply for internal funding, staff/students are given institutional awards such as best poster, best-lecturer etc. Anywhere that you want to showcase awards/achievements in addition to research outputs can all be integrated with ORCID and show up automatically in users' ORCID records.

## **Question from member**

A question was recently received by our inbox – has anyone in NZ used the Open Journal Systems (OJS) ORCID integration?

If you have any experience with this please get in touch so that we can give feedback to the person who asked – thanks.

## **News from ORCID**

You will have seen in the November ORCID newsletter that new affiliation types are being proposed. Thanks to those members who provided feedback on these.

Voting information should now have been sent out to the voting representative from your organisation. If your voting member has not received this information or if it has been sent to the wrong person please let us know.

## **Recent Google Group posts**

Plant and Food Research (PFR) have shared their Hub onboarding strategies in the [Google Group](#). Thanks to Michele Napier for sharing this. To date, Plant and Food Research is the organisation with most users going through the Hub to have affiliations written, thanks to the efforts of Michele and her other team members.

Jason has posted about the options presented by ORCID for a scenario where a researcher leaves an organisations and revokes permission given previously to add or

update information to their ORCID record. ORCID have suggested that an organisation could have a staff/student exit communications process, involving permission to write an end date to the user's ORCID record. In the event of a person leaving without an end date being written and permission being revoked, ORCID has a dispute resolution process regarding correction of information in an ORCID record.

Our contact address is [orcid@royalsociety.org.nz](mailto: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.

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