

## Onboarding your organisation to the production NZ ORCID Hub

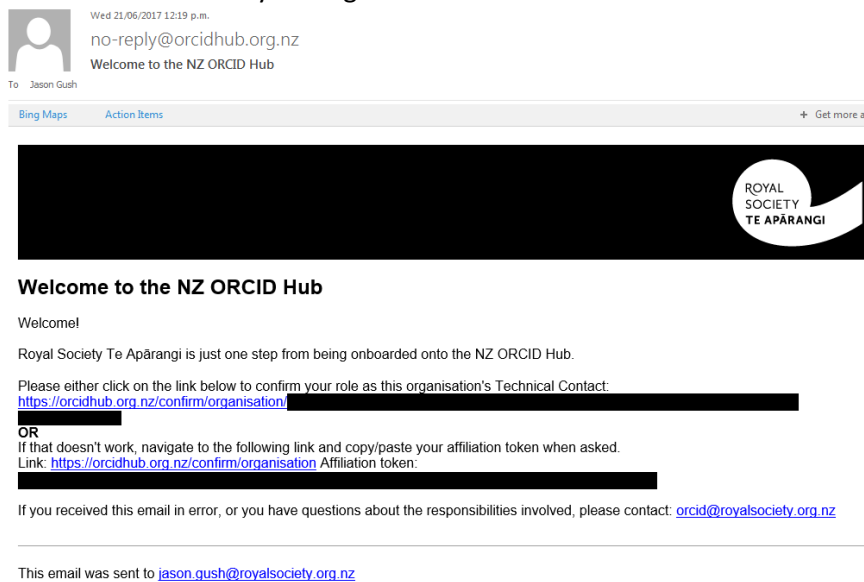
As your organisation's ORCID consortium technical contact, you are responsible for onboarding your organisation to the NZ ORCID Hub.

Note that, to onboard to the production Hub, you must have been through the test Hub environment and demonstrated that:

- a. your organisation is onboarded successfully
- b. you have connected at least one ORCID sandbox iD to your institution.

The process is slightly more complex than onboarding to the test Hub. ORCID sends the credentials in a more secure form than for testing. You must provide a cellphone or alternate email address for ORCID to send you a PIN which you enter into a service called 'passpack' to reveal your credentials. You then enter the credentials into the Hub. Follow the steps below:

1. **Send us a request for an invitation** to the production Hub ([orcid@royalsociety.org.nz](mailto:orcid@royalsociety.org.nz)). We will send an email with a link to click asking you to confirm that you are the nominated technical contact for your organisation: Screenshot 1 below:



2. Clicking the link in the email message takes you to the Hub. **Log in using your Tuakiri/REANNZ password.** Once in the Hub, you will land on a screen asking you to go ORCID to request your organisation's credentials (Client ID and Client Secret). **Click on the appropriate button:** Screenshot 2 (button circled; confirmation button for step 11 also circled):

orcid.org/0000-0001-8920-0452 Jason Gush log out

## Organisation Confirmation Form

**Organisation Name:** \*

Royal Society Te Apārangi

**Organisation Email:** \*

jason.gush@royalsociety.org.nz

**Take me to ORCID to obtain my Client ID and Client Secret.**

**Organisation Orcid Client Id:** \*

**Organisation Orcid Client Secret:** \*

**Country:** \*

New Zealand

**City:** \*

Wellington

**Disambiguation ORG id:** \*

210126

**Disambiguation ORG Source:** \*

RINGSOOL

**Confirmation**

2017 Royal Society of New Zealand

- Clicking the button in screenshot 2 takes you to ORCID's website where you will land on a page with a form, mostly pre-filled, as shown in the screenshot below. You will need to provide a **'Contact for receiving PIN to access credentials'**; this can be either an alternative email address or a cellphone number (with international code) or a skype handle. ORCID will use this to send you a PIN.

Click **'I'm not a robot'** at the bottom of this form and then click **'request credentials'**.

English

ORCID  
Connecting Research and Researchers

**FOR RESEARCHERS** **FOR ORGANIZATIONS** **ABOUT** **HELP** **SIGN IN**

**Register a client application: Production Member API - Trusted Party**

To request Production Member API credentials, please enter the following information about your client application and your organization. Before production credentials are issued, you will be asked to provide a demo of your integration. Items the ORCID team will be looking for in the demo are described at [Member credential check list](#).

*Note: This process is not fully automated. There may be a delay before we respond to you with credentials or a demo request after you complete this form.*

Stay in touch! Join our [ORCID API Users mailing list](#).

**General Information**

Registration for the production Members API service is open to [ORCID members organizations only](#). For more information about credentials and how to complete this form see [Register a Client Application](#).

**Update existing credentials?**

No  
 Yes

**Notes for ORCID staff**

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An NZ ORCID Hub integration for Royal Society Te Apārangi

Use this field to let us know if you're using a vendor system, include additional redirect URIs, or if there is anything else you'd like to communicate to the ORCID team.

**Name of your organization \***

Royal Society Te Apārangi

**Technical Contact e-mail address \***

jason.gush@royalsociety.org.nz

We will use this email address to send you the credentials and to contact you if any questions or errors come up with your integration.

**Contact for receiving PIN to access credentials \***

To ensure the security of your client credentials we will send you a PIN (personal identification number) that you need to use in order to access your client credentials. The PIN must be sent through a different means than the technical contact email address listed above. Please enter a second email address, phone number (with country code) to receive an SMS, or Skype handle. If you would prefer to receive the PIN via a different method, please enter it in the notes field.

**Displayed to Registry Users**

The following three fields will be displayed to users who are connecting to your application through the authorization process. You will be able to adjust this information later if needed.

**Name of your client application (generally, this is the name of your organization) \***

Royal Society Te Apārangi

**URL of the home page of your application \***

https://orcidhub.org.nz

**Short description of your client application (max 300 chars) \***

Short description of your client application (max 300 char) \*

This is an ORCID integration through the NZ ORCID HUB connecting at Royal Society Te Apārangi

**Redirect URIs**

Once the user has authorized your application, they will be returned to a URI that you specify. You must provide these URIs in advance. Only HTTPS URIs are accepted for the production server. For more information about redirect URIs, please see our [Knowledge Base article](#). (opens in a separate window)

OAuth2 redirect\_uris or callback URLs for this client (enter at least one -- HTTPS required)


Redirect URI 1 \*

Redirect URI 2

Redirect URI 3

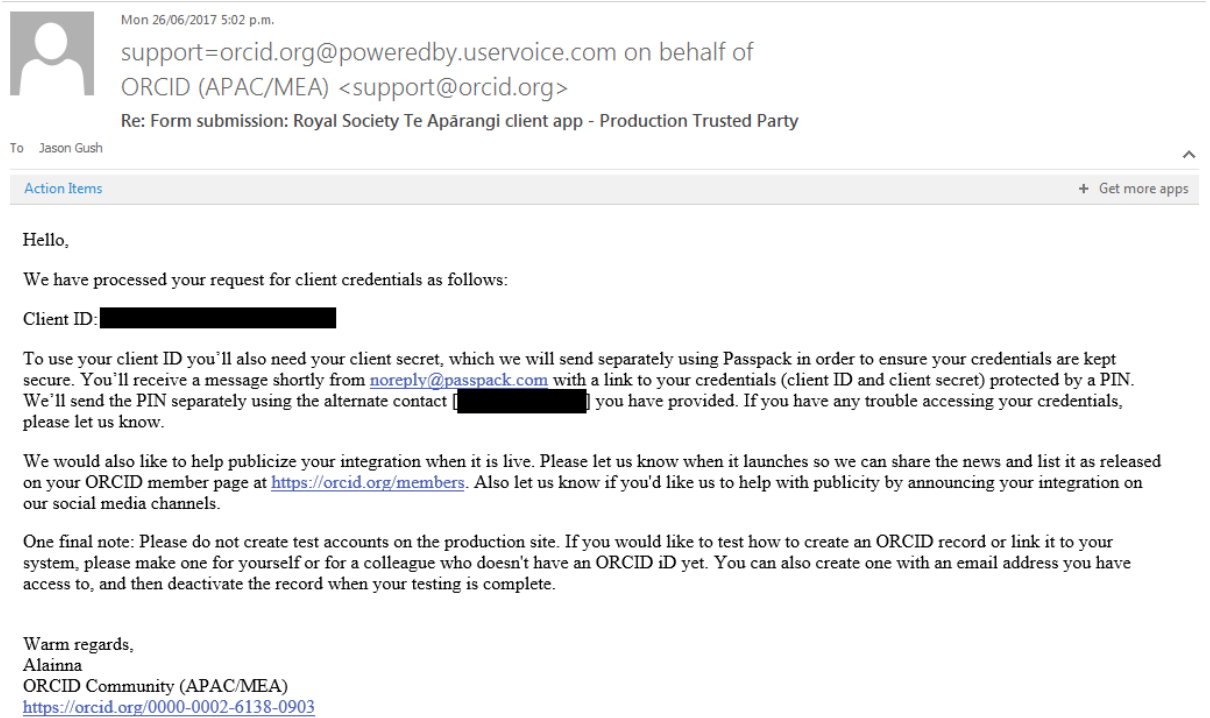
Redirect URI 4

Redirect URI 5

I'm not a robot 

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4. **Close your session, sit back and wait!** The next step is a manual one at ORCID support and can take up to three days. If, after this time, you haven't had a response please let [orcid@royalsociety.org.nz](mailto:orcid@royalsociety.org.nz) know and we'll chase this for you.
5. ORCID will send you an email containing your client ID and instructions on receiving the second part of your credentials: your 'client secret'. Screenshot 6 below:



6. Simultaneously with that email, the Passpack PIN is sent to whatever means of alternate contact you provided.  
**NOTE – this PIN expires in 36 hours. If you are unable to use it within that timeframe and it expires contact ORCID support ([support@orcid.org](mailto:support@orcid.org)) and they'll send you a new one.**
7. You will also receive an email from PASSPACK, with a link to click on, as shown below:



Mon 26/06/2017 5:02 p.m.

noreply@passpack.com

support@orcid.org sent you some passwords

To Jason Gush

Hello,

You have some new passwords waiting for you. Here's a personal message from [support@orcid.org](mailto:support@orcid.org):

**Follow the link in this message to access your ORCID client credentials. You will need to enter the PIN sent to you at+ [redacted]. Once you enter the PIN, click on the credentials to view them, then click show in the notes section.**

To view the passwords, ask [support@orcid.org](mailto:support@orcid.org) for the PIN number then go to:

[https://www.passpack.com/online/?minipack=\[redacted\]](https://www.passpack.com/online/?minipack=[redacted])

Please connect right away. This link will expire in 7 days.

Cheers from the Passpack Team

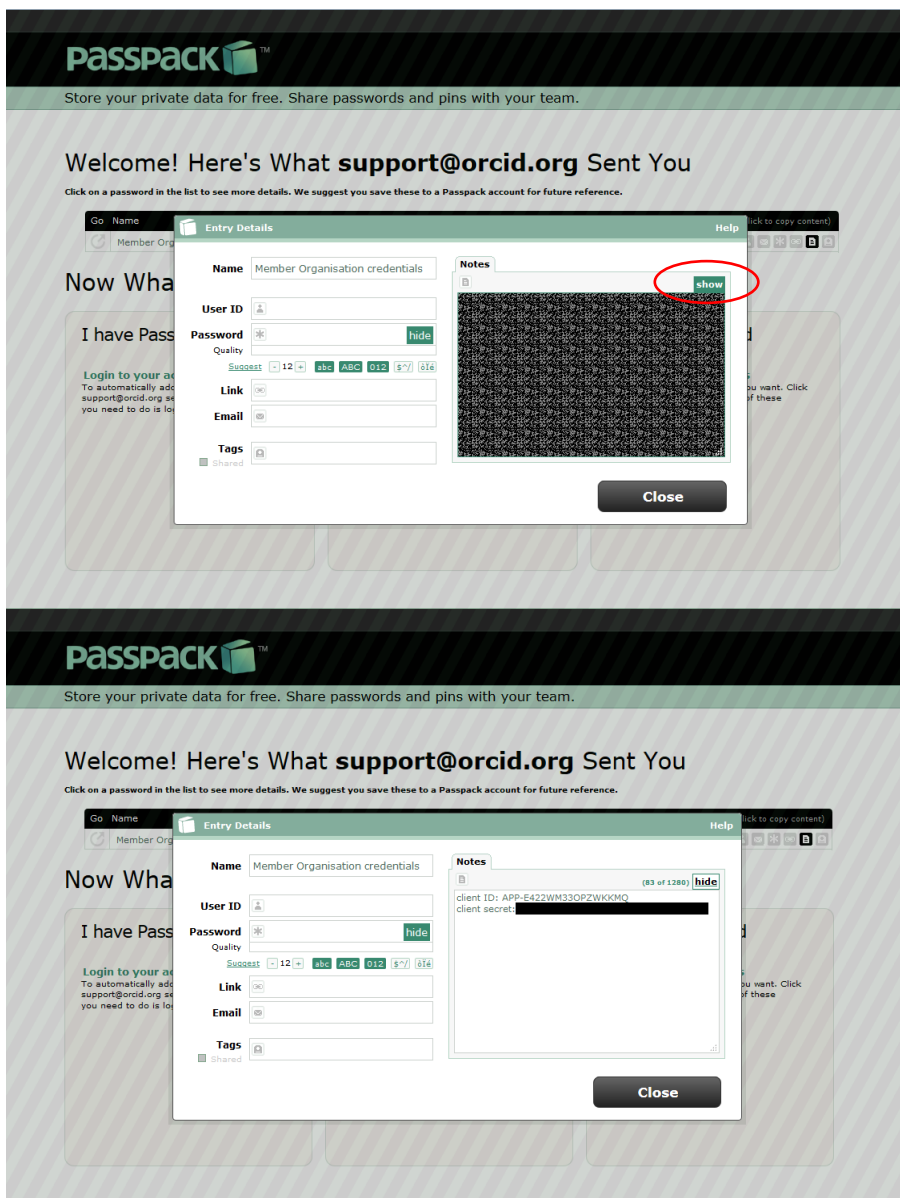
8. Enter your PIN into passpack, as below:

The screenshot shows the Passpack logo and tagline: "Store your private data for free. Share passwords and pins with your team." Below this, a message states: "support@orcid.org sent you 1 password entries. Enter your PIN and press OK to retrieve them now." A form with the label "Type your PIN number:" and an "OK" button is shown, with both circled in red. At the bottom, there is a navigation menu with categories: WHO'S IT FOR?, WHY PASSPACK?, HOW DOES IT WORK?, RESOURCES, and CUSTOMER SUPPORT.

9. Now, click in the box circled in the screenshot below to be taken to your credentials. Ignore the three boxes underneath: (I have passpack / I want to try passpack/ I'm not interested).

The screenshot shows the Passpack logo and tagline: "Store your private data for free. Share passwords and pins with your team." Below this, a heading reads: "Welcome! Here's What support@orcid.org Sent You". A sub-heading says: "Click on a password in the list to see more details. We suggest you save these to a Passpack account for future reference." A list of credentials is shown, with the first entry "Member Organisation credentials" circled in red. Below the list, there are three boxes: "I have Passpack", "I want to try Passpack", and "I'm not interested".

10. Click the green 'show' button on the right hand side of the passpack screen to reveal your credentials in the blacked-out box below. Note that copy and paste is not enabled so a print screen or other means of storing the client secret is necessary.



- Now that you have your credentials you need to enter them into the NZ ORCID Hub to onboard your organisation. **Go to the Hub via the link below, sign in, and enter the credentials into the screen from step 2, screenshot 2. Click on the 'confirmation' button at the bottom of the screen, also circled in step 2, screenshot 2.**



NB: Until you successfully enter API credentials, the Hub should automatically open for you at that screen.

- Congratulations – you have onboarded your organisation to the NZ ORCID Hub. You can invite all of your staff and students to create an ORCID iD or link their existing ORCID iD to your organisation, via the Hub, to have their employment/educational affiliation written. You can modify our [model communication](#) to tell your staff/students about ORCID and ask them to connect to you using the Hub. However, once onboarded, we will provide you with a version of this model, tailored to your specific organisation.
- Now that your organisation is onboard, please let us know when you have your ORCID communications available to your researchers. If you use our model, your organisation is eligible for ORCID's [Collect and Connect badges](#), from Authenticate, up to Connect.