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 (<u>orcid@royalsociety.org.nz</u>). 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:

	Wed 21/06/2017 12:19 p.m.
	no-reply@orcidhub.org.nz
	Welcome to the NZ ORCID Hub
To Jason Gush	
Bing Maps	Action Items + Get more ap
	ROYAL SOCIETY TE APÄRANGI
Welco	me to the NZ ORCID Hub
Welcome!	
Royal Soc	iety Te Apărangi is just one step from being onboarded onto the NZ ORCID Hub.
https://orci	ner click on the link below to confirm your role as this organisation's Technical Contact: <u>dhub org nz/confirm/organisation/</u> sn't work, navigate to the following link and copy/paste your affiliation token when asked.
Link: <u>https</u>	//orcidhub.org.nz/confirm/organisation Affiliation token:
If you rece	ived this email in error, or you have questions about the responsibilities involved, please contact: orcid@royalsociety.org.nz

This email was sent to jason.gush@royalsociety.org.nz

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):

	S orcid.org/0000-0001-8920-0452	🚆 Jason Gush 💙	C+ k
Organisation Confirmation Form			
Organisation Name: *			
Royal Society Te Apărangi			
Organisation Emailid: *			
ason.gush@royalsociety.org.nz			
D Take me to ORCID to obtain my Client ID and Client Secret			
Organisation Orcid Client Id: ^			
organisation oroto olient to.			
Organisation Oroid Client Secret: *			
organisation orold Glient Secret: "			
Country *			
New Zealand			
City * Weilington			
Disambiguation ORG Id *			
210125			
Disambiguation ORG Source '			
RINGGOLD			
Confirmation			
2017 Royal Society of New Zealand			

3. 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'.

Search	_			X	English	
	FOR RESEARCHERS	FOR ORGANIZATIONS	ABOUT	HELP	SIGN IN	
Connecting Research						
and Researchers						
	Register a client	application: Product	ion Mem	ber API	Trusted Party	
	To request Production	Member API credentials, pla	ease enter th	e following	information about vo	ur client
	application and your o	rganization. Before product ation. Items the ORCID team	ion credentia	als are issue	d, you will be asked to	provide
		not fully automated. There o request after you comple			e we respond to you	with
	Stay in touch! Join our	ORCID API Users mailing lis	t.			
	General Informa	ition				
		oduction Members API servi ut credentials and how to co				
	Update existing credent	ials?				
	No					
	©Yes					
	Notes for ORCID staff Notes for ORCID staff					
	An NZ ORCID Hub integr	ation for Royal Society Te Apāran	gi			•
	Use this field to let us know you'd like to communicate	w if you're using a vendor system e to the ORCID team.	, include addit	ional redirect	URIs, or if there is anythin	g else
	Name of your organizati	on *				
	Royal Society Te Apärang	ji .				
	Technical Contact e-mail	address *				
	jason.gush@royalsociety	.org.nz				
		ress to send you the credentials a	nd to contact j	ou if any que	stions or errors come up v	with your
	integration Contact for receiving PIN					
	Contact for receiving Pir	to access credentials *				
	To ensure the security of y	our client credentials we will sen	d vou a PIN (pe	rsonal identi	fication number) that you	need to
		r client credentials. The PIN must				
		e. Please enter a second email add				n SMS, on
	Skype handle. If you would	d prefer to receive the PIN via a d	ifferent metho	d, please ente	er it in the notes field	
	Displayed to Reg	jistry Users				
		lds will be displayed to user: You will be able to adjust th				ugh the
	Name of your client appl	lication (generally, this is the n	ame of your o	rganization	•	
	Royal Society Te Apärang	ji				
	URL of the home page of	fyour application *				
	https://orcidhub.org.nz					
	https://orcianub.org.nz					

	· · · · · · · · · · · · · · · · · · ·
	Short description of your client application (max 300 char) *
	This is an ORCID integration through the N2 ORCID HUB connecting at Royal Society Te Aplrangi
	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)
	information about redirect Okis, 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 *
	https://orcidhub.org.nz/auth
	Redirect URI 2
	Redirect URI 3
	Redirect URI 4
	Redirect URI 5
	I'm not a robot
	Request Credentials
Contact Us Privacy Poli	9) Terms of Mag. Dates Source Project

- 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 <u>orcid@royalsociety.org.nz</u> 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:

	Mon 26/06/2017 5:02 p.m.	
	support=orcid.org@poweredby.uservoice.com on behalf of	
	ORCID (APAC/MEA) <support@orcid.org></support@orcid.org>	
	Re: Form submission: Royal Society Te Apārangi client app - Production Trusted Party	
To Jason Gush		~
Action Items		+ Get more apps
Action Items Hello,		+ Get more apps
Hello,	rocessed your request for client credentials as follows:	+ Get more apps
Hello, We have pr	rocessed your request for client credentials as follows:	+ Get more apps
Hello,	rocessed your request for client credentials as follows:	+ Get more apps

To use your client ID you'll also need your client secret, which we will send separately using Passpack in order to ensure your credentials are kept secure. You'll receive a message shortly from <u>noreply@passpack.com</u> with a link to your credentials (client ID and client secret) protected by a PIN. We'll send the PIN separately using the alternate contact [______] you have provided. If you have any trouble accessing your credentials, please let us know.

We would also like to help publicize your integration when it is live. Please let us know when it launches so we can share the news and list it as released on your ORCID member page at https://orcid.org/members. Also let us know if you'd like us to help with publicity by announcing your integration on our social media channels.

One final note: Please do not create test accounts on the production site. If you would like to test how to create an ORCID record or link it to your system, please make one for yourself or for a colleague who doesn't have an ORCID iD yet. You can also create one with an email address you have access to, and then deactivate the record when your testing is complete.

Warm regards, Alainna ORCID Community (APAC/MEA) https://orcid.org/0000-0002-6138-0903

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 (<u>support@orcid.org</u>) 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:



Hello,

You have some new passwords waiting for you. Here's a personal message from 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+

To view the passwords, ask support@orcid.org for the PIN number then go to: <a href="https://www.passpack.com/online/?minipack="https://www.passpack.com/onlin

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

Cheers from the Passpack Team

8. Enter your PIN into passpack, as below:

, . an privace	e data for free. Share pass	words and pins with y	our team.	
	org sent you 1 password entri ress OK to retrieve them now.	es.	Type your PIN number:	ОК
WHO'S IT FOR?	WHY PASSPACK?	HOW DOES IT WORK?	RESOURCES	CUSTOMER SUPPORT
WHO'S IT FOR? Everyday Folks	WHY PASSPACK?	HOW DOES IT WORK?	RESOURCES About Us	CUSTOMER SUPPORT
Everyday Folks				
	Top 3 Reasons	Tour	About Us	PDF Getting Started
Everyday Folks Head of Household	Top 3 Reasons Password Sharing	Tour Security	About Us Media Center	PDF Getting Started Online Help Center

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).

Passpack í 🕅		
Store your private data for free. Sha	re passwords and pins with your team.	
		Cont Vou
	at support@orcid.org	
Go Name	uggest you save these to a Passpack account for future h	(click to copy content)
Member Organisation credentials		SHARED L V X C L A
low What Should I D I have Passpack	o? I want to try Passpack	I'm not interested
Login to your account To automatcally aid the entries supportigenticity services to your account, all you need to do is login now.	Sign up for free San up nor for paragack now and the passwords supportflorid, org sent you will automatically be saved to your new account.	Export these passwords IV, your data - are it where you want. Click above to copy the CSV export of these passwords.

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.

Welcomel	Here's	What suppo	rt@orcid.o	ra Sent Vo	
		letails. We suggest you save these			
Go Name	📔 Entry Deta	ils			Help
C Member Org			Notes		
Now Wha	Name	lember Organisation credentials			show
	User ID 🔒				
I have Pass	Password Quality	c hi	de		1
Login to your ac To automatically add		- 12 + sbc ABC 012 5☆	òlé a transferante a		
support@orcid.org se you need to do is log	Link Email				ou want. Click of these
	Tags Shared				
				Close	
Passpa	CK	M			
		Mee. Share passwords an	d pins with your tea	am.	
		Mee. Share passwords an	d pins with your tea	am.	
Store your private	e data for fr				
Store your private Welcome!	e data for fr	What suppo	t@orcid.oi	·g Sent You	
Store your private Welcome!	e data for fr Here's list to see more d	What suppor	t@orcid.oi	·g Sent You	
Store your private Welcome!	e data for fr	What suppor	t@orcid.oi	·g Sent You	
Store your private Welcome! Click on a password in the Go Name Member Org	e data for fr Here's list to see more d Entry Detai	What suppor	t@orcid.or	r g Sent You ure reference.	Help Itck to copy content)
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11. 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.

- 12. 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 <u>model communication</u> 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.
- 13. 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 <u>Collect and Connect badges</u>, from Authenticate, up to Connect.