

Onboarding your organisation to the NZ ORCID Hub – non Tuakiri Consortium Member Organisations

This guide is for NZ ORCID consortium member technical contacts to assist them in onboarding their organisation to the NZ ORCID Hub. It includes instructions on requesting the organisation's member credentials from ORCID.

1. Connect your ORCID iD to the Hub

Before you onboard your organisation to the NZ ORCID Hub you must create a personal ORCID iD and make your email address visible to trusted parties, as the Hub needs temporary access to it from ORCID. You can, if you wish, return your email address in ORCID to private once you have completed the following steps:

- a. **Sign into your ORCID iD or create one, if you haven't already done so, go to 'account settings' and make your email address visible to trusted parties.** If you have more than one email address associated with your ORCID record please tell us which one you wish to use in the Hub.
- b. When you have completed step a. **[contact us](#) to ask for an invitation** to be sent to you to onboard your organisation to the Hub.
- c. **Click on the link** in the Hub invitation email. This takes you to the Hub where you will log in using your ORCID iD as follows:

Click the Hub's log in button on the top right of the screen.

Select the right hand option to log in with ORCID – this takes you to ORCID.

Sign in to your ORCID iD with your ORCID username and password.

You will be presented with a screen telling you that the NZ ORCID Hub has asked for the following access to your ORCID record: 'get your ORCID iD'. **Click 'authorize'**

You will be returned to the NZ ORCID Hub. You can now go to your ORCID iD and return your email address to private, if desired.

2. Requesting Credentials for your organisation

- a. Log in to [the NZ ORCID Hub](#), if not already in, using the log in with ORCID option.

You will immediately land on the 'organisation confirmation form', with your organisation's name and your email address pre-filled. Click on 'take me to ORCID to obtain my Client ID and Client Secret', shown below:

The screenshot shows the 'Organisation Confirmation Form' interface. At the top right, there is a header with 'orcid.org/0000-0001-8920-0452', a user profile for 'Jason Gush', and a 'log out' link. The form title is 'Organisation Confirmation Form'. Below the title, there are several input fields: 'Organisation Name' (pre-filled with 'Royal Society To Apirangi'), 'Organisation Emailid' (pre-filled with 'jason.gush@royalsociety.org.nz'), 'Organisation Orcid Client Id', 'Organisation Orcid Client Secret', 'Country' (pre-filled with 'New Zealand'), 'City' (pre-filled with 'Wellington'), 'Disambiguation ORG id' (pre-filled with '210126'), and 'Disambiguation ORG Source' (pre-filled with 'RINGGOLD'). A button with a green 'ID' icon and the text 'Take me to ORCID to obtain my Client ID and Client Secret' is highlighted with a red circle. At the bottom of the form is a 'Confirmation' button. The footer of the page contains '2017 Royal Society of New Zealand' and a small logo.

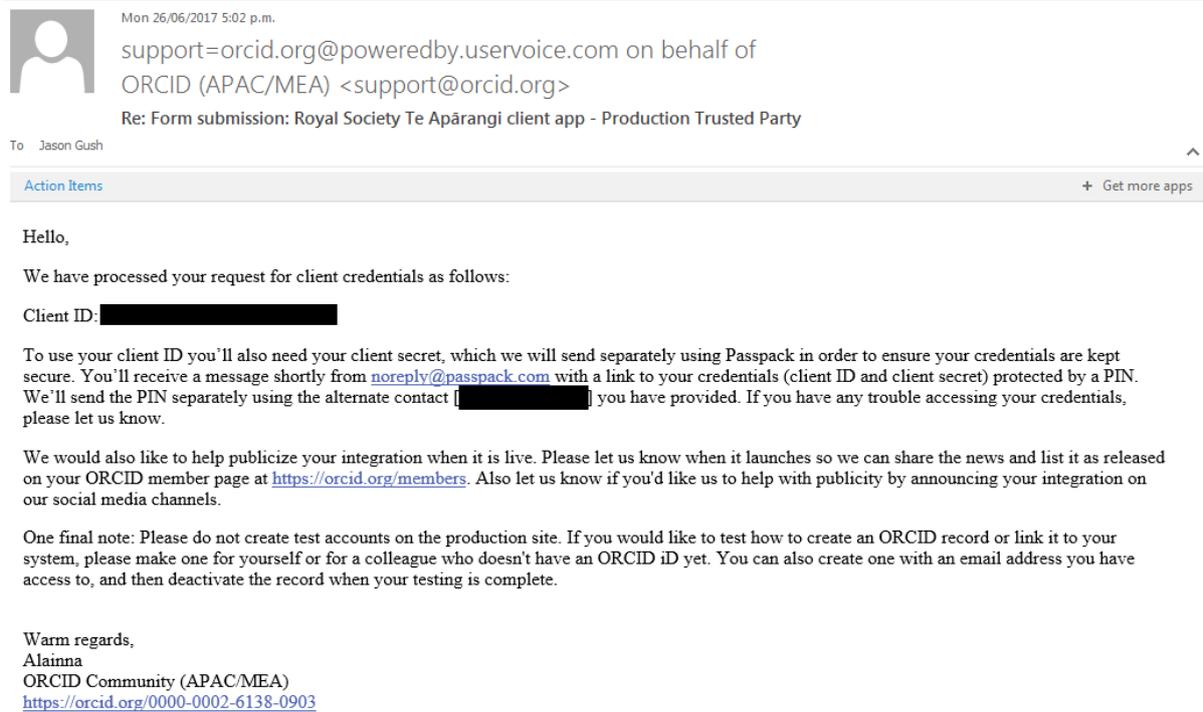
- b. You will be taken to ORCID to 'register a client application: Production Member API-Trusted Party'.

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. You will use this PIN to access the credentials.

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

- c. Close your session in the Hub. ORCID may take up to three days to send your credentials, as this is a manual process. If, after three working days you have not received your credentials from ORCID please [contact us](#).

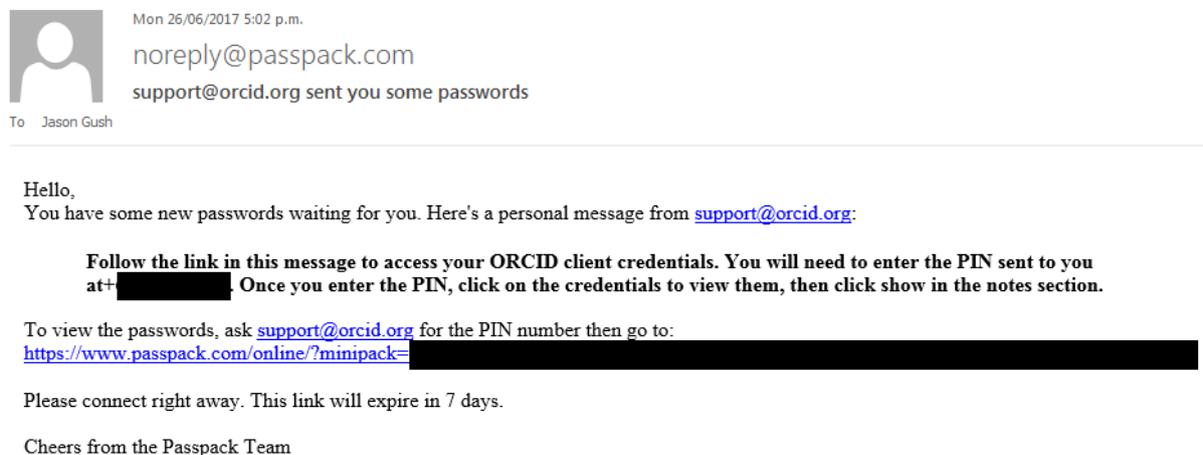
- d. **You will receive an email from ORCID** containing your client ID and instructions for receiving the second part of your credentials, your client secret, as shown below:



- e. **You will receive a PIN** to the other contact point you provided to ORCID In step 2b. above.

Please note this PIN expires in 36 hours. If you are unable to use it within this time frame, and it expires, contact ORCID at support@orcid.org and a new one will be sent to you.

You will receive an email from passpack with a **link to click on** as shown below:



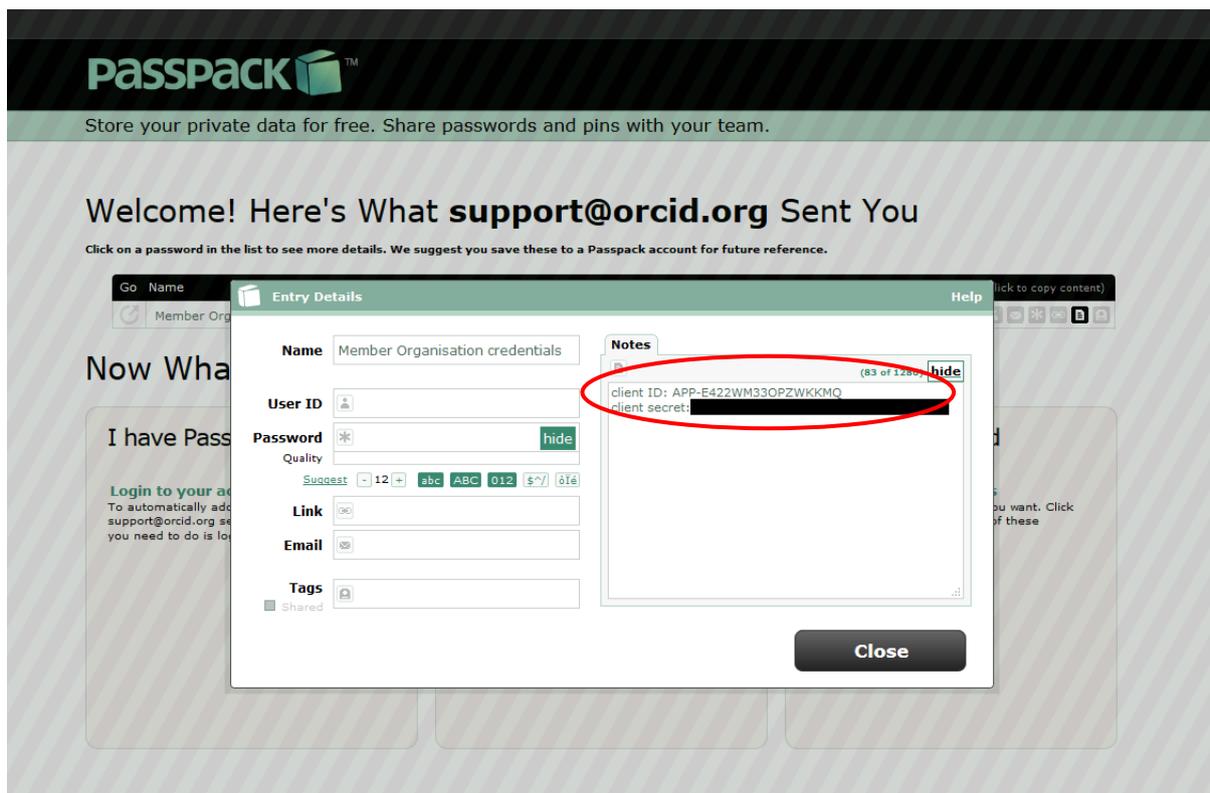
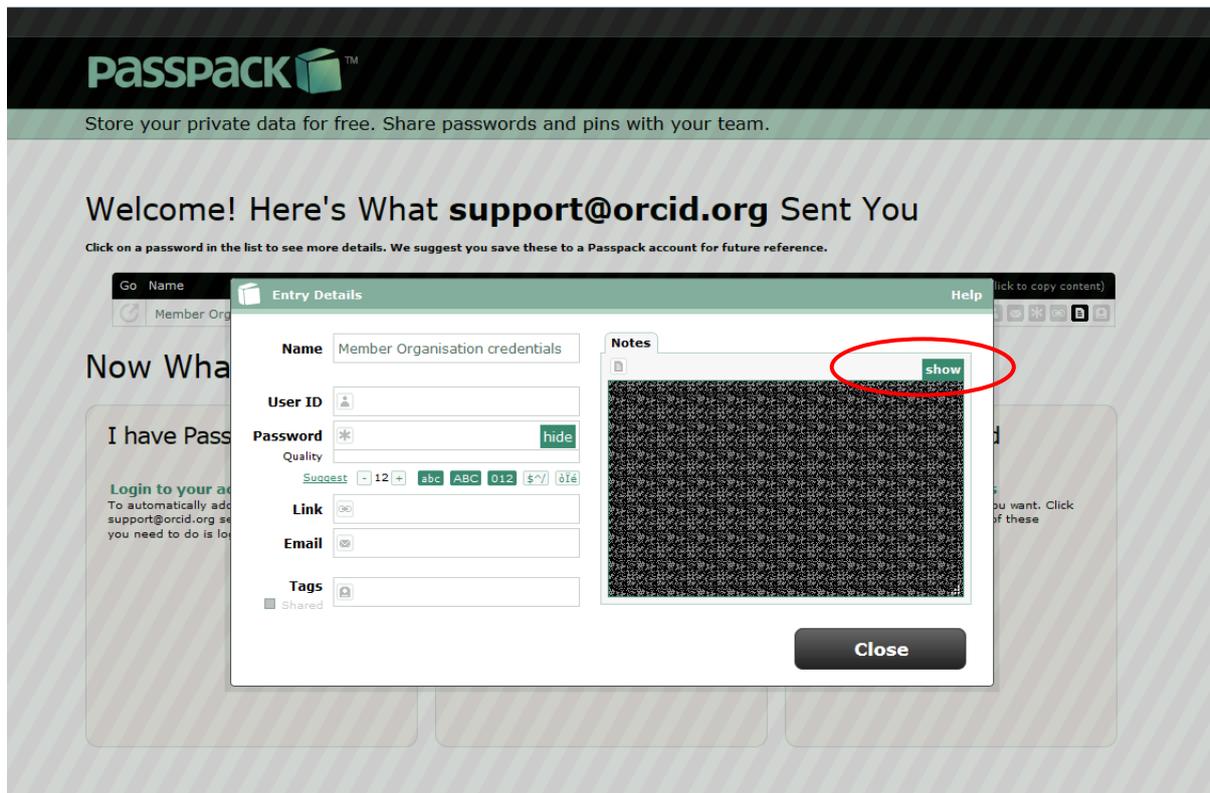
f. Enter your PIN into passpack:

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 field is labeled "Type your PIN number:" with an "OK" button next to it. A red oval highlights the input field and the button.

g. Click 'Member organisation credentials' as shown below. 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. Below is a heading: "Welcome! Here's What support@orcid.org Sent You". A sub-heading reads: "Click on a password in the list to see more details. We suggest you save these to a Passpack account for future reference." A table lists credentials, with "Member Organisation credentials" circled in red. To the right of the table are three columns: "I have Passpack", "I want to try Passpack", and "I'm not interested". Each column contains a heading and a brief description of the action.

h. Click the green 'show' button on the right hand side to reveal your credentials. Note that copy and paste is not enabled so you will need a screenshot or some other means of storing the client secret.



3. Entering your credentials into the NZ ORCID Hub

- a. Go to the [NZ ORCID Hub](#) and **log in** using the right hand log-in option to log in with your ORCID iD; this will take you to ORCID. **Log into ORCID**; you will be returned to the Hub.

You will be presented with the '**organisation confirmation form**'

- b. **Enter your client iD and client secret into the boxes**, scroll down and **click 'confirm'**.

Congratulations – you have onboarded your organisation to the NZ ORCID Hub. You can now use the Hub to assert employment/education affiliations for staff/students, and/or write funding awarded by your organisation.